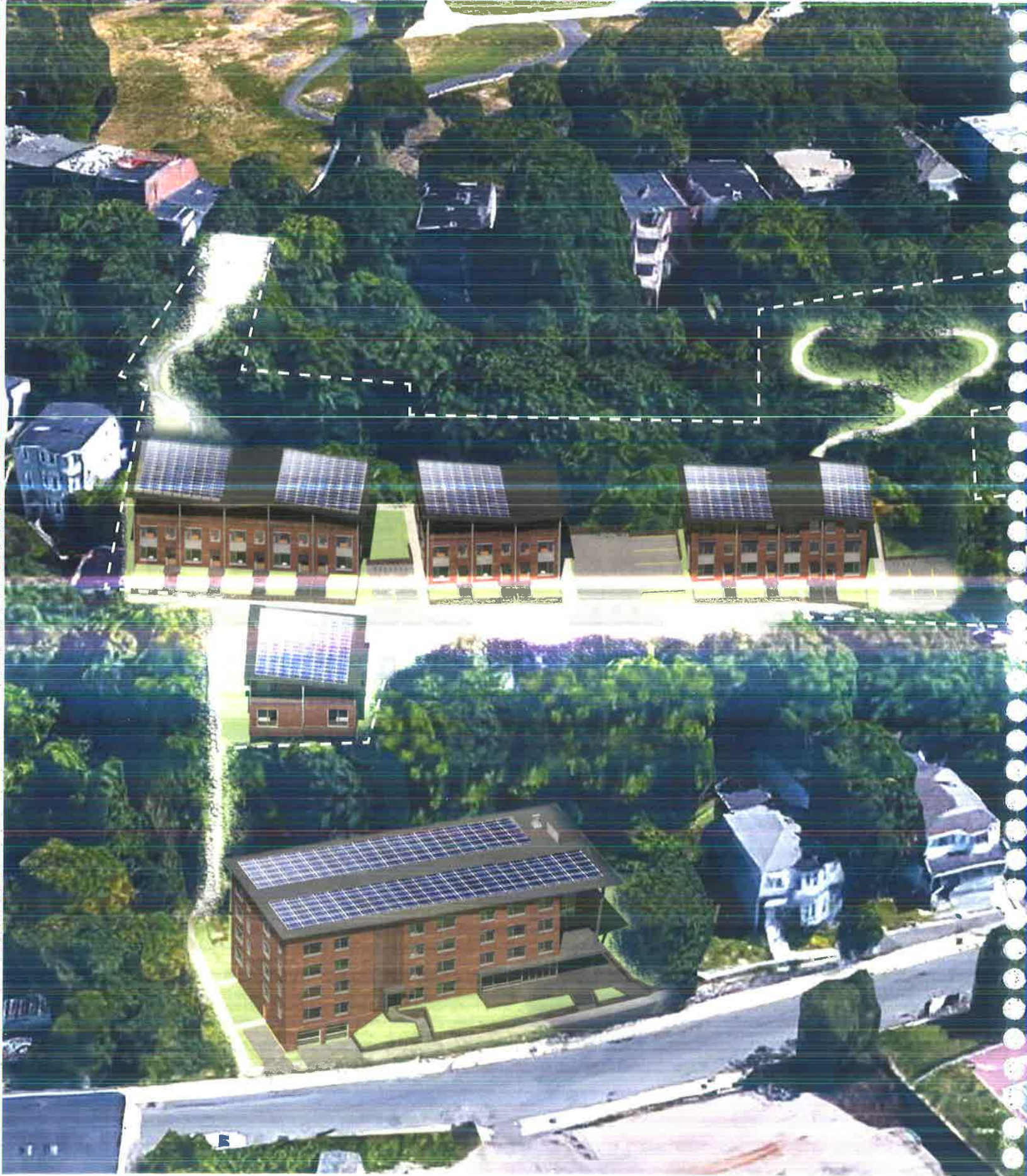




**PROPOSAL FOR CITY OF BOSTON  
DEPARTMENT OF NEIGHBORHOOD DEVELOPMENT  
E+ MARCELLA HIGHLAND PACKAGE 2**

**2**



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# **PROPOSAL SUMMARY + INTRODUCTION**

## PROPOSAL SUMMARY + INTRODUCTION

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### Applicant's Interest & Overview

The E+ Marcella-Highland RFP presents an exciting opportunity to participate in a ground-breaking development and create a high-quality mixed-income residential community in the Highland Park neighborhood. The goals of our proposal, and of the RFP itself, are ambitious: cutting-edge energy-efficient, green design and development; a wide range of resident affordability; and a diverse and inclusive development team and approach to community engagement.

Our Proposal represents a thoughtful response to the goals of the Highland Park community and the City of Boston, set forth in the RFP. Our proposed development will be an asset to the neighborhood by enhancing its burgeoning reputation for cutting-edge design and sustainable development, simultaneous with promoting an inclusionary model for living. We aim to create a “community within a community”: a limited-equity cooperative community that enhances and becomes a part of the Highland Park community.

Further, our proposal recognizes that Highland Park is a unique and historic neighborhood, in which new development should be sensitive to the storied history while reflecting the 21<sup>st</sup> century realities of climate change and the need for a carbon neutral development approach. The design we propose is fresh, innovative, green, and community-oriented.

In response to Package 2, Rees-Larkin Development proposes the creation of 14 rowhouses on Marcella Street, constructed to Passive House standards. As such, the development will serve as a local and regional benchmark for energy-efficient green design. The development will be organized as a mixed-income limited-equity cooperative.

### Credible Development Plan

Our development plan is credible for two primary reasons: the development team and the financing approach.

The highlights of our proposed development include the following:

*Experienced Developer.* Jon Rudzinski brings over 20 years of experience in utilizing complex public and private financing mechanisms to develop quality mixed-income communities, in Boston and elsewhere, as founder and principal of Rees-Larkin Development and, previously, as an executive at WinnDevelopment.

*Experienced Architect.* Project Architect Studio G Architects has 25 years of experience designing urban housing and high performance buildings, including energy-positive.

*Local Team.* Our team is local. Rees-Larkin, Studio G Architects and RDLA are all headquartered about a half mile away. Studio G, RDLA and YouthBuild Boston have deep connections to Highland Park, and team members live in the neighborhood and nearby.

*Innovative Sustainable Design.* The Proposal not only meets, but exceeds, the requirements of the Boston E+ Green Design Program, as evidenced by the preliminary HERS ratings. The buildings have been designed to Passive House standards – an innovative approach for a development of this size. The project will garner a LEED for Homes Platinum designation.

*Community Enhancement.* Our design incorporates several features that will provide a benefit to the Highland Park community, including a vertical path connecting Highland Park to Marcella Street and Highland Street; an arts/workspace; a community garden; and a woodland garden.

*Mixed-Income Affordability.* Our proposed development enhances the preferred income-mix set forth in the RFP by providing a deeper affordability for the lowest of the three income tiers. Of the 14 units proposed for Package 2, we propose six (6) units at 60% of the Area Median Income (AMI), of which one (1) will be at 30% of the AMI. Three (3) units will be at 100% of the AMI; and five (5) units will be unrestricted market-rate units.

*Diversity and Inclusion.* The Development team members have been selected because of their commitment to diversity and inclusion. Project Architect Studio G Architects, and CDW Consultants, who will serve as the civil engineer and the environmental consultant, are WBE-certified. Structural Engineer RSE Associates is MBE certified. Consigli Construction, the selected general contractor, has an excellent track record in MBE/WBE outreach and in providing opportunities for Boston residents and disadvantaged workers. YouthBuild Boston will provide assistance in the construction of the proposed on-site community amenities, as well as work with Consigli to create job training opportunities. Refer to the full Diversity + Inclusion Section.

#### **Submission in Conjunction with Package 4**

This application is being submitted in conjunction with an application for Package 4. The application for Package 4 consists of the same development team, and is consistent with this application in terms of the income mix and housing tenure. If selected for both packages, we will treat the two parcels as a single project. Our proposed combination of the Packages 2 and 4 is advantageous in at least two ways.

Firstly, a limited equity cooperative financed with low-income housing tax credits (LIHTC's) depends on the economies of scale inherent in the greater

number of units in a combined project. Due to the tremendous value of the tax credits, an approach that utilizes LIHTC's is arguably the only way to achieve deep-income targeting in the project; in terms of the use of DND resources it is certainly the *most efficient* way to do so.

Secondly, combining the two Packages will allow for one of the largest examples regionally of a development constructed to Passive House standards.



## PROPOSAL SUMMARY + INTRODUCTION

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### Organizational Structure: Developer

Rees-Larkin Development LLC is a single-member limited liability company (LLC), with Jon Rudzinski as the manager and sole member. Upon selection of this proposal a new, to-be-formed single-purpose LLC will accept the conveyance of the parcels. The proposed name for the new entity is M-H Redevelopment LLC. The manager and majority member of M-H Redevelopment LLC will be another single-purpose LLC whose manager and majority member is Rees-Larkin Development LLC – for the sake of illustration this entity will be referred to as “Managing Member LLC.”

As principal of Rees-Larkin Development, Rudzinski will personally implement or oversee all aspects of the development project, including: the development of the project plan; permitting; securing state and/or federal subsidy, securing private financing; design; construction; and marketing. Following the stabilization of the project, to the extent that the financing (particularly the tax-credit equity financing) requires the long-term involvement of Rees-Larkin Development, Rudzinski will personally take on the role of asset management in conjunction with the limited equity cooperative entity.

### Organizational Structure: Limited Equity Cooperative

The limited equity cooperative structure allows for deeper-income targeting through the utilization of low-income housing tax credits, while providing for a long-term ownership stake in the development for residents.

*Development Phase.* As described above, at the full financial closing, M-H Redevelopment will accept the conveyance of the parcels and become the long-term owner. “Managing Member LLC” (a single-purpose LLC controlled by Rees-Larkin

Development LLC or Jon Rudzinski) will serve as the managing member of M-H Redevelopment. A tax credit investor entity will be admitted as an investor member of M-H Redevelopment.

*Marketing Phase.* During the construction period and into the marketing period, the limited equity cooperative will be created and formalized, with the residents of the development as the members of the cooperative.

*Stabilization Phase.* Upon full occupancy and financial stabilization, the limited equity cooperative will formally enter “Managing Member LLC” as a member and thereby begin to assume the rights and responsibilities of ownership. To the extent required by the tax credit investor, Rees-Larkin Development LLC or Jon Rudzinski will remain as the managing member of Managing Member LLC through the LIHTC compliance period. During the LIHTC compliance period, the resident members of the cooperative will prepare for the full responsibility of ownership through training and a gradual assumption of responsibility. At the end of the compliance period, the limited equity cooperative entity will buy out both the tax credit investor and Rees-Larkin Development LLC, thereby assuming sole control of “Managing Member LLC” and the cooperative.









# **DEVELOPMENT TEAM + QUALIFICATIONS**

**Rees-Larkin Development**

**Prime/Architecture**  
 Studio G Architects  
 WBE Certified

Principal Gail Sullivan, FAIA, LEED AP MA Reg. #8666	Principal-In-Charge, Director of Practice, Sylvia Mihich, AIA, LEED AP BD+C MA Reg. #11157
Project Manager Sayo Okada, AIA, LEED AP MA Reg. #50574	Job Captain Gabriela Shelburne, Assoc. AIA

**Structural Engineer**

**RSE Associates**

James Sullivan, PE, Principal  
 MA Reg. # 47146  
 Edward Pombo, PE  
 MA Reg. # 51958

MBE Certified

**Energy Model Consultant**

**Advanced Building Analysis**

Thomas Brown

**MEP/FP Engineer**

**Petersen Engineering**

James Petersen, PE  
 Principal in Charge  
 MA Reg. #36560  
 Wade Carter, PE, Project Mgr.  
 MA. Reg #49048

**Civil Engineer,**

**CDW Consultants**

Tom Williams, PE  
 Assoc. Principal / Chief Engineer  
 MA Reg. #41596  
 Dan Anderson  
 Assistant Project Manager

WBE Certified

**Renewable Energy Consultant**

**ReVision Energy**

Phil Coupe, Co-Founder &  
 Managing Partner  
 James Mauer  
 Managing Director

**MA Building Code Consultant**

**Building, Fire and Access, Inc**

Robert Corbett, PE  
 MA #39551  
 Fire Protection

**Landscape Architect**

**Ray Dunetz Landscape Architecture**

Ray Dunetz, RLA  
 Managing Principal  
 MA Reg. #1015  
 Michelle de Tommaso, RLA  
 MA Reg. #1592

**Community Employment**

**YouthBuild Boston**

Michael S. Chavez,  
 LEED AP,  
 Architectural Designer / Project  
 Development Manager

## DEVELOPMENT TEAM + QUALIFICATIONS

To respond most effectively to an RFP with ambitious goals, Rees-Larkin has assembled an outstanding and experienced development team. Each member brings specific and critical expertise to successfully fulfilling the RFP goals. The development team members share a common vision for this aspirational project, and enjoy prior working relationships. Having worked seamlessly together on this submission, the team anticipates a tightly integrated development-design-construction process.

This team has the capacity to deliver a development for Highland Park that meets the E+, affordability, diversity, and community benefit goals sought by the City of Boston. Moreover, the team is local. Rees-Larkin Development and Studio G Architects are located in Jamaica Plain's Brewery, a half mile from the project. Landscape Architect RDLA is near Green Street Station. Youth Build Boston is headquartered in Highland Park.

### Developer | Rees-Larkin Development

Jon Rudzinski has over 20 years of experience undertaking challenging projects and developing successful mixed-income communities, for the past nine years as principal of Rees-Larkin Development and previously as Senior Vice President at WinnDevelopment. At Winn, he was responsible for several re-development projects in the City of Boston that involved Article 80 permitting approval and/or complex ownership and financing structures. Castle Square involved the redevelopment of a 500-unit apartment community in the South End in partnership with the tenants' organization. The Baker Square project represented the final phase of the decades-long redevelopment of the Baker Chocolate Factory in Dorchester Lower Mills).

Rees-Larkin Development, founded in 2008 and based in Jamaica Plain, has earned a reputation for utilizing complicated public financing mechanisms, including low-income housing tax credits, to create financial feasibility that enhances affordability and creates award-winning developments. Since 2012 Rees-Larkin Development has completed four developments, with a total of 293 units, most affordable, and 40,000 square feet of commercial space. Each of the four is relevant to this proposal.

### ***Rice Silk Mill (45 units; Pittsfield, MA)***

Rice Silk Mill is a mixed-income development that was completed on schedule and on budget, and is financially stable. The financing for this adaptive re-use project included LIHTC's and other DHCD resources, as well as historic rehabilitation tax credits. The project received a LEED for Homes Silver designation; and the project received the Preservation Massachusetts Paul E. Tsongas Award.



*Community Room at Rice Mill / Rees-Larkin Development*

## DEVELOPMENT TEAM + QUALIFICATIONS

### ***Boott Mill West (78 units; Lowell, MA)***

Boott Mill West is a \$37.1 million mixed-use and mixed-income development that was completed on schedule and on budget, and is financially stable. Of the 78 units, 62 are market-rate units. The complicated financing structure included New Markets Tax Credits, historic rehabilitation tax credits, and resources from DHCD. Because the project was developed – and continues to operate – within a pre-existing condominium, a notable feature of the project has been the complicated negotiations and ongoing co-operation between the condo unit owners and Rees-Larkin Development. Rudzinski serves as the majority Trustee of the Condo Board of Trustees, which oversee 39 owner-occupied condo units, 78 rental apartments, and 40,000 square feet of occupied commercial space.

### ***Dalton Apartment (100 units; Pittsfield, MA)***

Dalton Apartment is a primarily affordable apartment community financed with LIHTC's and other DHCD resources. Rees-Larkin Development redeveloped the one-time troubled housing complex by undertaking its substantial rehabilitation and garnering the resources that allowed the property to achieve financial stability.

Massachusetts Mills III (70 units; Lowell, MA) is a mixed-income development that includes 13 unrestricted market-rate units. The financing for this \$28.9 million adaptive re-use project included LIHTC's and other resources from DHCD, as well as historic rehabilitation tax credits. Construction rehabilitation was completed in 2017; the property has already achieved full occupancy and financial stabilization.

A profile for Rees-Larkin Development, Jon Rudzinski's resume, and references, is included in Appendix 12.



*Bootts Mill West Exterior / Rees-Larkin Development*



45 Townsend St. Project under design / Studio G Architects

## Studio G Architects, WBE | Architect

For 25 years, WBE firm Studio G Architects has designed affordable, public and market housing, both rental and home-ownership, primarily in Boston and other urban areas. Studio G's experience with Article 80 permitting and community review in Boston extends to non-residential projects as well as housing. A participant in the AIA 2030 Commitment, the firm designs high performance buildings that are energy and resource-efficient, minimize fossil fuels, maximize opportunities for passive solar heating and natural ventilation, and create healthy indoor environments. Relevant projects include:

### **45 Townsend Street (300 units; Roxbury)**

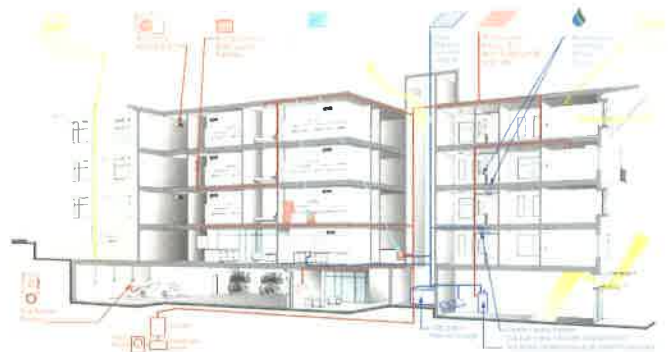
45 Townsend Street, near-net zero housing currently in design, is a model of forward-thinking sustainable development. Guided by Passive House strategies, a high-performance envelope will reduce heating and cooling demand and deliver healthy dwelling units. Photovoltaic panels will generate close to 500kW, a substantial portion of the electric demand. The project is tracking LEED Gold v.4 and possible PHIUS certification.

Three-bedroom townhouses with individual

entries and projecting bays, and a local café and a co-working space at the ground floor engage the existing neighborhood. The development includes a variety of shared amenity spaces indoors and out. An active green roof tops the below-grade parking garage, and the steep site slope is being utilized to capture, store and utilize rainwater for irrigation.

### **E+ Parker Terrace (Multi-unit, Roxbury)**

This DND development submission included 45 units in 7 rowhouses, 8 duplex apartments and 30 flats, located in three buildings on a steeply sloped Mission Hill site. The project demonstrated it could surpass LEED Platinum and produce 250 KWH of renewable energy. Buildings were located to take advantage of passive solar heating, windows were sized and shaded per façade direction, and right-sized mechanical systems reduced power loads. With photovoltaic (PV) and solar thermal panels, the buildings could generate more electricity and hot water than annual demand, making it energy-positive.



E+ Parker Terrace Sustainability strategies proposal

### **270 Centre St, (Mixed-use; Jamaica Plain)**

Completed in 2011, this 40,000sf mixed-use TOD project is across adjacent to Jackson Square T Station and the Southwest Corridor Park. 30 units of affordable housing on three upper floors sits on retail space at the street level. The façade has a rhythm of brick broken by multi-story corrugated metal bays that relate in scale to nearby

## DEVELOPMENT TEAM + QUALIFICATIONS



270 Centre St. Built project/Studio G Architects

houses. Facing Jackson Square, the corner bay is curved, with a vegetated screen above. The high performance envelope and energy efficient systems meet Energy Star and LEED standards. The design includes passive solar strategies: the long elevations face north and south, and natural light and ventilation are maximized with large operable windows. The roof has a 15kW photovoltaic array.

*Managing Principal Gail Sullivan* will oversee Article 80 and community process. She has long experience with Highland Park. She is currently PIC for 45 Townsend Street and 150 River Street in Mattapan.

*Principal Sylvia Mihich* will be Principal in Charge. With over 25 years of experience designing multifamily housing in Boston and California, she will lead the project through design and construction phases.

A former resident of Highland Park, she designed the Kittredge Rowhouse renovations as well as a new house on Lambert, part of an earlier DND disposition process.

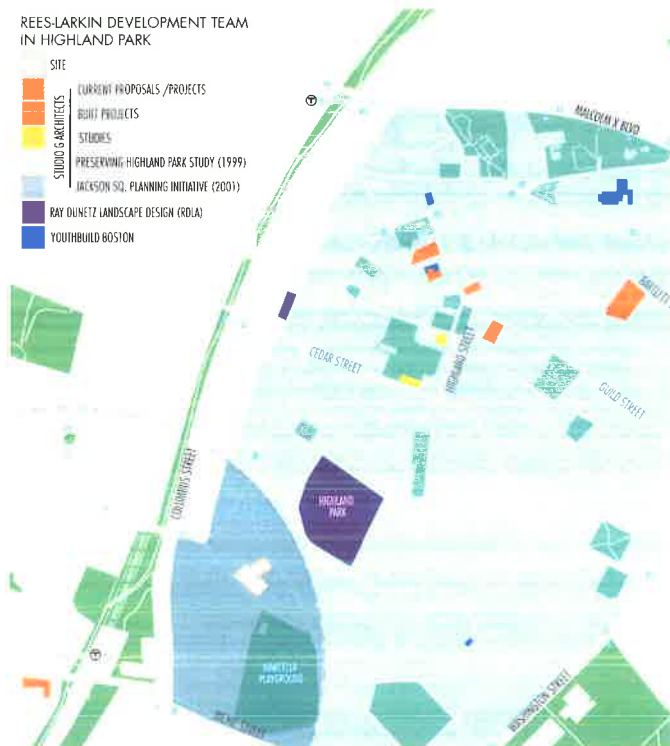
*Project Manager Sayo Okada* will manage the project team and the design production to meet E+ target. A LEED AP and Passive House Consultant, she will apply her expertise in high performance envelope and systems as well as seven years of

housing experience to achieving a project that meets or exceeds the goals.

*Job Captain Gabriela Shelburne* will collaborate with Sayo on design and construction documents. She'll apply her experience on numerous multifamily residential projects, as well as her experience on E+ Parker Terrace and several high performance public schools to making E+ Marcella Highland a successful project. She has a personal as well as professional interest, as a resident of Highland Park.

## Design Team + Highland Park

Members of the Rees-Larkin Development team have deep experience in Roxbury, and particularly Highland Park, bringing abundant experience and insight to E+ Marcella Highland. In 1999, Studio G Architects (then Gail Sullivan Associates) conducted a study for Boston Landmarks Commission focused on preservation of Highland Park's unique architectural fabric and stabilization of the neighborhood as gentrification pressures





arose. The report, Preserving Highland Park, Protecting a Living Community has been utilized since to help guide development. In 2001, Studio G Architects led an intensive community planning process for the BRA and Jackson Square Planning Initiative which achieved a community consensus on development and resulted in the Partners for Jackson development still underway. Studio G designed renovations for Paige Academy and the formerly BRA-owned Kittredge Rowhouses, and did a study for Alvah Kittredge House. RDLA completed design of upgrades to Highland Park.

### **Petersen Engineering | MEP Engineer**

Now in its 27th year, Petersen Engineering has built a solid reputation for expertise in sustainable, energy efficient, integrated design of high performance buildings; and a whole-building approach to projects. The firm's philosophy is to focus on reducing energy demand first and then consider cost effective energy supply solutions including renewables. The firm recently consulted on The Distillery, one of the first multi-family Passive House buildings in New England. Through a well-insulated and air-sealed envelope, combined with energy efficient mechanical systems, peak heating loads were reduced by 85% compared to conventional construction.

### **RSE Associates | Structural Engineer**

RSE Associates, Inc., established in 2001, has since expanded into a multi-disciplinary international firm. With offices across the United States and in London, RSE has successfully completed award winning projects throughout America, Europe and Asia. The firm's principals and engineers have extensive and diverse experience in complex and demanding projects, providing the technical ability of a large international firm with the personal service of a small firm.

### **Advanced Building Analysis | LEED for Homes Rater / Energy Consultant**

Founded in 2007, Advanced Building Analysis, LLC set out to provide clients with unbiased and quantifiable assessments of building energy use and related building science. HERS Rating is the basis of ABA's core competencies. The firm delivers consulting, energy modelling, inspections, testing, and submissions to meet the myriad requirements and goals of the following programs: ENERGY STAR Homes, Zero Net Energy Ready Homes, Passive House Institute United States, LEED for Homes, National Green Building Standard, Residential IECC and MA Stretch Energy Code, and MassSave Residential New Construction.

### **CDW Consultants, WBE | Civil Engineer & Environmental Consultant**

CDW, a WBE firm, has worked with multiple Massachusetts municipalities on an On-Call and project basis on housing projects. Examples include survey and design civil/site work for a 20,000 SF addition at the Department of Veterans Affairs in Roxbury, MA which included storm water management. Lars Andresen, Assistant Project Manager assigned to this project is also a Highland Park resident and an active member of the community.

### **Ray Dunetz Landscape Architecture | Architect**

RDLA has provided sustainable landscape design services for multifamily housing projects in Boston and other cities over the last 15 years. RDLA has worked successfully with the Department of Neighborhood Development on community garden projects, including a new garden at Roxbury Community College. RDLA's most significant work in this neighborhood is the renovation of Highland Park for the Boston Parks and Recreation Department in 2014.

## DEVELOPMENT TEAM + QUALIFICATIONS

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### **ReVision Energy | Renewable Energy Consultant**

Revision Energy is an industry leader in solar design, installation, and service in northern New England. Since 2003 the company has installed over 20 megawatts (MW) of solar power. It owns and operates over 60 solar projects under power purchase agreements (PPA) with hosts, totaling nearly 5 MW of installed solar energy valued at \$15 million.

ReVison Energy has joined the team to design and install renewable solar electric systems. YouthBuild Boston may assist Revision in installing the photovoltaic panels, expanding the skills development of participants.

### **YouthBuild Boston | Community Partner**

YouthBuild Boston Designery staff will work with the design team on designing the landscape structures. Participants in its Building Trades Exploration program will participate in on-site landscaping, including construction of community gardens and other landscape structures, as well as assisting in installation of rooftop photoelectric panels. Through its Pre-Apprentice program, which provides an avenue into the Building Trades, it will be able to place workers on the job, through General Contractor Consigli.

### **Building, Fire + Access | Building Code Consultant**

Building, Fire & Access, Inc. is a consulting engineering firm specializing in building code, fire protection, life safety and accessibility compliance. Founded by Robert Carasitti, P.E., BF&A delivers a variety of services to assist owners, developers, architects and authorities with the construction of code compliant facilities.

A particular strength of BF&A is Mr. Carasitti's strong involvement in the codes and standards promulgation process. This experience provides specific insight into the code development process

which supports the ability to develop code compliant approaches, equivalencies and variances that achieve both code intent and design objectives.

### **Consigli Construction | General Contractor**

A fourth-generation family-owned company based in Massachusetts, Consigli offers comprehensive construction management and design-build services for clients in a wide-range of markets. We provide clients with an innovative, collaborative and hands-on approach that includes full transparency from the start of pre-construction all the way through the project's completion. Recognized by Engineering News-Record as one of the 100-largest construction management firms in the country and the second largest in Massachusetts by the Boston Business Journal, we have offices throughout the Northeast and Mid-Atlantic region. Consigli has received numerous awards and recognition as a top place to work and for its quality craftsmanship.

The project will engage Consigli in a "negotiated bid" process. Consigli has already participated in the conceptual design; under a negotiated bid the project will benefit from Consigli's expertise, particularly in sustainable design, throughout the design process.

## Contacts

### **Developer | Rees-Larkin Development**

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### **YouthBuild Boston | Community Partner**

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### **Building, Fire + Access | Building Code Consultant**

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*Rice Silk Mill Pittsfield MA Rees-Larkin*

# **PLAN FOR DEVELOPMENT**

## PLAN FOR DEVELOPMENT

### Development Goals

The goals of our proposal, and indeed of the RFP itself, are ambitious in their breadth. They include cutting-edge energy-efficiency, sustainable design and development; a wide range of resident affordability; and a diverse and inclusive development approach.

Our proposal recognizes that new development in the unique and historic Highland Park neighborhood should be sensitive to the storied history, while reflecting a new 21<sup>st</sup> century epoch, facing the risks of climate change head on, and taking advantage of advances in building and systems technologies. The design is fresh, innovative, green, and community-oriented.

### Development Program

We propose to construct 14 rowhouse units, targeted to families, in four (4) buildings arranged along Marcella Street. On the parcels comprising Package 2a we propose the construction of two (2) four-bedroom rowhouses in a single two-story building. Each of these two four-bedroom units will include a fully-accessible bedroom suite on the first floor; as such the units can serve a variety of family types, particularly families that include a mobility-impaired person. On the parcels comprising Package 2b we propose the construction of twelve (12) three-bedroom rowhouses in three (3) three-story buildings.

The rowhouse buildings infill Marcella Street with modern facades that recall the rhythm of the neighborhood’s historic rowhouses. See the Design section for detailed description of urban, building and landscape design.

### Submitted in Conjunction with Package 4

This application is submitted in conjunction with an application for Package 4. The application for Package 4 consists of the same development team and green building approach, and is consistent with this application in terms of the income mix and housing tenure. If selected for both packages, we propose to treat the two parcels as a single project. Our proposed combination of Packages 2 and 4 is advantageous in at least two ways.

Firstly, a limited equity cooperative financed with low-income housing tax credits (LIHTC’s) depends on the economies of scale inherent in the greater number of units in a combined project. Due to the tremendous value of the tax credits, an approach that utilizes LIHTC’s is arguably the only way to achieve deep-income targeting in the project; in terms of the use of DND resources it is certainly the most efficient way to do so.

Secondly, combining the two Packages will allow for one of the largest examples regionally of a development constructed to Passive House standards.

14 ROWHOUSES	UNIT TYPE	# UNITS	# FLOORS	AREA	FEATURES
ALL HAVE KITCHEN PATIOS/DECKS	3 BEDROOM , 2.5 BATHS	8	3	1500 SF	3RD FL MASTER SUITE W/ BALCONY
	3 BEDROOM, 2.5 BATH	4	3	1500 SF	3RD FL BEDROOM W/ JULIET BALCONY
	4 BEDROOM, 2 BATH	2	2	1600 SF	1ST FL MASTER SUITE W/ BALCONY

Package 2 Development Program

## Affordable and Work Force Housing.

The proposed income-mix for the development extends affordability beyond the guidelines set forth in the RFP – with deeper income targeting over a greater number of units – while still falling within the spirit of those guidelines. The inclusion of LIHTC’s in our financing plan allows for this deeper income targeting: 60% AMI and 30% AMI units rather than 80% AMI units. The income mix is:

- Market-rate (unrestricted): five (5) units;
- < 100% of AMI: three (3) units;
- < 60% of AMI: five (5) units;
- < 30% AMI: one (1) unit.

The proposed limited-equity cooperative structure will allow the development to BOTH provide the opportunity for resident ownership AND provide that opportunity to lower-income families. The deeper income targeting offered by our proposal, with homes targeted to families at 60% and 30% of AMI, would not be possible in a structure that involved the sale of individual, or single-family, homes in fee-simple interest.

## Stable Occupancy

Refer to Appendix 14 for the Stable Occupancy Narrative that outlines how the project will meet the occupancy requirements of the RFP.

## Carbon Neutral Vision, Green Building Design + Net Energy Positive Performance

The proposed project exceeds the threshold of the Boston E+ Green Building Program as shown by the HERS ratings shown in the Carbon Neutral Vision and Design Sections of the proposal. The project seeks to be a model for sustainable, energy-

efficient design on a larger residential scale. Most notably, the buildings will be designed to meet the Passive House standard, setting a new threshold for green, affordable housing. See the Design and Carbon Neutral Vision sections respectively for detailed description of design, and of energy-positive approach and analysis.

For public education plans, see Community Amenities + Engagement section.

## Diversity + Inclusion

We have assembled a diverse team for the development, and a program for diversity and inclusion through construction and post-occupancy. See Diversity + Inclusion section for a description of how the project will meet the diversity and inclusion goals of the RFP.

## Architectural & Site

The proposed development offers building design that is clearly of the 21<sup>st</sup> century in form, materiality and green design. The modern buildings are contextual, healing the deteriorated urban fabric in a way that is both respectful



45 Townsend Street / Studio G Architects

## PLAN FOR DEVELOPMENT

of the architectural history and distinctively representative of the contemporary goals of this RFP. See the Design section for detailed description and images of the building and landscape design.

### **A Strong, Credible Plan**

Our development plan is credible for two primary reasons: the development team, and the financing approach. The strength of our development team brings credibility in multiple ways.

#### **Expertise**

Our design and construction team members have the expertise to design and construct buildings and a site that meet and exceed the specific goals of Boston E+ Green Building Program. Studio G Architects, Petersen Engineering, and Advanced Building Analysis are local leaders in sustainable design. Consigli Construction has made sustainability a focus as it has become a leader in constructing institutional and publicly-funded buildings.

#### **Scale**

Our development team members have a proven track-record in successfully designing, developing and building projects of this scale and larger. Over the past decade, Rees-Larkin Development has developed residential projects of 40 to 100 units by focusing on only one or two projects at a given time. Studio G Architects has completed projects with construction budgets in excess of \$30M, and is currently working on larger scale public and private projects. Consigli Construction is currently the second-largest contractor in Massachusetts by dollar value.

#### **Community Focus**

Key members of the development team are local: Rees-Larkin Development, Studio G Architects, and Ray Dunetz Landscape Architecture are all

headquartered in Jamaica Plain, about a half mile away. They share a commitment to community engagement. Our team has years of experience working WITH – not against – local stakeholders to create successful communities.

Our financing plan is a credible approach to achieving the design and affordability goals of the RFP. The twin goals of ownership and deeply-targeted affordability impose a limited range of appropriate financing approaches. The limited-equity cooperative model allows for the achievement of both goals – specifically when it is financed in conjunction with low-income housing tax credits and other public resources. The LIHTC's bring a deep subsidy to the project that allows for deep income-targeting. Moreover, the LIHTC's and the other public resources help bring financial feasibility to the ambitious design goals of the RFP.

#### **Time Line**

Refer to Appendix 4 for the complete Development Timetable. Our development approach depends on the allocation of LIHTC's and other resources by Massachusetts Department of Housing and Community Development (DHCD); and for that reason the Development Timetable is heavily dependent on the projected schedule and requirements of the DHCD allocation rounds. To be eligible to apply for LIHTC's, a project must have secured local zoning approval; moreover, DHCD has held only a single LIHTC funding round in each of the past few years. The next funding round has not been announced, but recent history suggests that it will be held in the winter of 2019. The Development Timetable assumes that DHCD holds a LIHTC funding round in January 2019 and makes funding awards by May 2019. Assuming that the project receives an LIHTC funding award from DHCD in the Winter 2019 funding round, the



necessity for DHCD funding approval in essence delays the schedule for the Project by about six months (the difference between the projected dates for the receipt of zoning approval – November 2018 – and the receipt of DHCD funding approval – May 2019).

## **ONE-STOP Development Budget**

Refer to Appendix 8 for a complete Development Budget in both the DND format and the ONE-STOP format.

### ***Financing Letters of Interest***

Refer to Appendix 9 for the following financing letters of interest:

#### ***Boston Private Bank and Trust***

Boston Private Bank is willing to provide first mortgage construction and permanent financing for the project, in the estimated amounts of \$7,250,000 and \$2,900,000, respectively. Rees-Larkin Development has a decade-long business relationship with Boston Private Bank. Most recently, Boston Private Bank provided an \$18.5 million construction loan for Rees-Larkin Development's Massachusetts Mills III project, a 70-unit mixed-income development in Lowell that was completed in 2017.

#### ***MHEF/MHIC***

The Massachusetts Housing Equity Fund (MHEF, an affiliate of MHIC) is willing to provide federal and state low-income housing tax-credit equity in the estimated amounts of \$4.7 million and \$1.3 million, respectively. MHEF provided a \$13.9 million federal tax credit equity investment in the Massachusetts Mills III project.

#### ***MassCEC***

The project will qualify for an incentive from the Massachusetts Clean Energy Center in the estimated amount of \$36,499.



*E+ Parker Terrace Solar Arrays / Studio G Architects*

### ***Solar PV Electric System***

Due to tremendous uncertainty in the Solar PV Electric industry, it is impossible to predict what the most efficient method of financing the installation of the System will be when the project is built. Our proposal includes the estimated cost of installing the system (\$266,669) in the construction budget. Our proposal also includes an estimate of the Net Present Value of owning the System (\$522,846) as a Source in the Development Pro Forma, on the assumption that this value will be able to be efficiently monetized. ReVision Energy has provided the estimates for the construction cost and the benefits schedule.

### ***Plans / Specifications / Boards***

Refer to Appendices 13 and 14.

### ***Responsiveness to Green Building, Energy Efficiency and Net Energy Positive Goals***

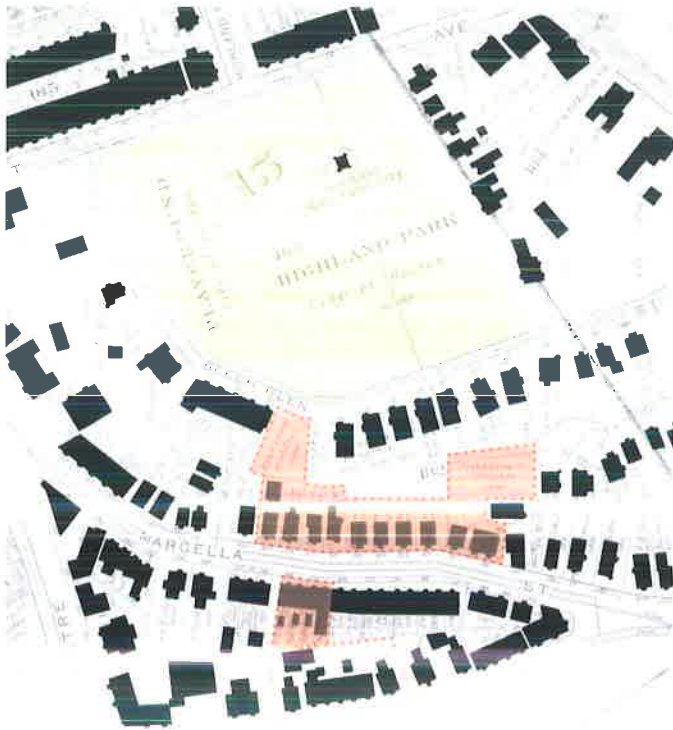
See Carbon Neutral Vision Section , and Appendix 10 for

- LEED for Homes Checklist
- HERS Index
- Energy Use and Source Summary



# DESIGN

## DESIGN



1913 Bromley map of Marcella, Highland neighborhood

### Highland Park

The DND-owned parcels in this RFP are in a unique area of Boston with deep historical roots tracing to the founding of our city. Highland Park tracks and reflects key historic epochs of the city's history through their physical character, up to the current day. It is listed on the National Register of Historic Places.

Established in 1630 as a farming settlement, Highland Park was of strategic importance to the colonists during the Revolutionary War. Because the highlands offered sweeping views of Boston Harbor and the Neck, an earthen fort was constructed on the summit of the hill in 1775. American troops used the First Church green, whose pastor was John Harvard, as their campground.

The district was developed throughout the 19<sup>th</sup> century, first by a few wealthy businessmen with

country estates; later farms were subdivided into more estates and large homes. Highland Park is unique in its diversity of architectural styles, including Federal, Greek and Gothic Revival, Italianate, Second Empire and Victorian; as well as the range of typologies: farmhouses, estates, brick rowhouses and triple deckers abound. It is equally notable for its social history, including as the home of reformer William Lloyd Garrison, publisher of the Abolitionist paper, The Liberator.

By the 1950's, Highland Park was a predominantly African American neighborhood, subjected to redlining, public and private neglect, and abandonment of many properties. This legacy remains visible in today's urban context, with many vacant parcels, including these long-held city parcels

New development in this neighborhood should recognize and be sensitive to its storied history, while reflecting yet a new epoch, the 21<sup>st</sup> century with the risks of climate change and advances in building and systems technologies.

### Urban Design Context

Located on the steep southwestern slope of Highland Park, the Marcella and Highland Streets neighborhood lies between Fort Hill and DPW's salt shed, distinguished by a 100' change in elevation. The location is transit-oriented, less than half a mile from Jackson Square T/ bus station and a Stop & Shop, with more commercial businesses just beyond. Roxbury Community College and the Southwest Corridor Park are within a half mile.

The area has ample open space and recreational facilities. In addition to Highland Park commemorating the fort at the top of the hill, Marcella Playground, located at the southern edge



*Parks and open space*



*Transit for the Marcella/Highland neighborhood*

of the neighborhood, offers baseball and basketball facilities as well as play structures. Southwest Corridor Park provides additional outdoor sports facilities as well as a safe bicycle route to Back Bay and the South End. Malcolm X Park and the Shelburne Community Center half a mile to

the east, offer a pool, recreational facilities and programming.

Formerly a strong residential neighborhood with an edge of commercial and light industrial buildings to the southwest, the once densely built neighborhood of Marcella and Highland Streets is now pocketed with vacant lots. Still defined by its topography, streets curving to circumvent the steep terrain reveal gaps and low value uses like construction materials storage where houses once stood.

The buildings which remain offer a uniquely rich urban context of diverse architectural styles and elements. The steeply sloped neighborhood with Roxbury Puddingstone outcroppings and 19<sup>th</sup> century stone walls dispersed throughout offers a strong framework for new development and opportunities for great views.

### **Reknit the Urban Fabric**

The proposed project is designed to reknit the residential fabric of the neighborhood, and provide community connectivity so desired by the



*Rowhouse roofs cascade down Marcella Street*

Highland Park neighbors. New rowhouse buildings on Parcels 2A & B aligned with adjacent structures infill the site and reintegrate the deteriorated and discontinuous street line. The buildings are scaled to reflect and complement existing rowhouse and woodframe buildings. They track the curving street, and are fronted by low stone walls built from site-harvested stone, defining the boundary between the public sidewalk and private front yards. A line of trees in the front yards further defines and enhances the streetscape.

Buildings were carefully sized and sited to follow the street line and minimize impact on, and excavation of, existing ledge. As a result, rowhouse buildings vary in length and number of units. The layout accommodates two public paths across the property. One climbing to a community garden on Beech Glen and linking to Highland Park at the summit, as well as to a proposed path on Parcel 4. The other climbs to the end of Thwing Street and offers a woodland walking path. These are further described in Community Amenities and Engagement Section.

## **E+ Housing Program**

The project includes 14 rowhouses, designed to be high performance, energy positive (E+), producing

more energy than they consume, and designed to reflect the city's Green Building Objectives. The designs meet Passive House standards. Rainwater will be retained on site, recharging the groundwater and reused for irrigation.

On Parcel 2A, two 4BR accessible rowhouses are located in one 2-story building. The size reflects the extant pair of rowhouses to its north. On Parcel 2B, twelve 3BR rowhouses are organized in three 3-story buildings, with five, three and four units as needed to minimize ledge removal and maintain street visibility of Roxbury Puddingstone outcroppings. In response to ledge, units at the 4-unit building have a partial ground floor with a bedroom and bath and living space is on the first floor, making them ideal multi-generational units.

Each rowhouse has its own entry from the public sidewalk, through the unit's front yard, to the front door. Accessible units have at-grade entries, the others have private stairs. Rear fenced patios or decks provide each rowhouse with private outdoor space. Paved walkways provide passage from the rear of each unit to the public sidewalk. A gently sloped open 'meadow' area at the rear of Parcel 2B offers a common outdoor area for residents, with picnic tables and opportunity for play and family



gathering. The buildings and units are designed to meet IBC, MAAB and Fair Housing Act.

### Building Design

The design of the rowhouse buildings adheres to a prevalent typology of the neighborhood, exuding a modern unique character which contributes to and enhances the neighborhood’s vibrant architectural mix and expresses the green building agenda. The terracotta rainscreen clad buildings are topped with a standing seam metal folded roof plane which connects the several buildings into a coherent whole. Metal clad fins support a 3’ deep roof overhang, frame the rowhouses and provide privacy between them. Front doors with canopies cover each unit entry. Generous window openings are accentuated with projecting metal plate frames. Ganged windows with infill panels encased in projecting metal plates are reminiscent of bay windows and punctuate the façade, creating a rhythm across the building face. Top floor balconies on 3-story rowhouses offer additional private outdoor space and opportunities for interaction with neighbors. All these elements and variations combine across the individual buildings, yielding a dynamic presence to the street, contributing to and being respectful of the neighboring context.

A variety of configurations addresses different housing needs and preferences. At Parcel 2A, the at-grade entries and ground floor master bedroom suites provide two accessible units for individuals and families with mobility challenges. The ground floor is completed with an open living/dining/kitchen space, a secondary side entry door, and a deck off the master bedroom at the rear. Three bedrooms and a bathroom at the second floor complete the unit.

At Parcel 2B, two different unit types are provided. At the 5- and 3-unit buildings an open plan of living, dining, and kitchen at the first floor create a comfortable gathering space for families or



Section of rowhouse on Parcel 2B

## DESIGN



*Rowhouses on both sides of Marcella Street reknit the urban fabric*

individuals living together. Lift and slide doors at the kitchen open to the rear patio and extend the living space to the outdoors. For convenience, a half bath is provided under the stairs. The second floor is fitted with two bedrooms, a full bath, and washer/dryer closet. A master suite with private bathroom, walk-in closet, and balcony completes the unit at the third floor.

The 4-unit building provides a floor plan ideally suited to extended families or people with home businesses. In response to the topographical site conditions, the entry level is foreshortened, delivering a generous bedroom with sitting area,  $\frac{3}{4}$  bath and closet in addition to an entry hall and closet. Located adjacent to the entry, this bedroom could easily be used as a home office or in-law suite. The second floor provides an open living, dining and kitchen plan, with at grade access to the private patio at the rear. A half bath is provided for convenience. The third floor includes

two bedrooms, one with balcony, a bathroom, and washer/dryer closet.

### **Energy Positive/Water Conserving**

Studio G Architects utilized a holistic sustainable design approach in the design of the Marcella Street rowhouses, to generate an energy positive project that meets Passive House requirements and will be LEED Platinum, exceeds Energy Star, and establishes a new benchmark for urban, sustainable living. The green building approach is summarized here and detailed in the Carbon Neutral Vision + Green Building section. Based on optimized building envelopes, the HVAC system was downsized to meet low building energy demands. Heating and cooling is provided by VRF units, with HRVs for continuous ventilation. All HVAC and domestic hot water systems are electric, eliminating fossil fuel use in the buildings. With the roof-mounted PV system, the design achieves the E+/Net Energy Positive target. A 94.9kw roof-



mounted solar panel array is designed to produce more energy than the annual demand for the building. The project has achieved a preliminary HERS Index of 37 without the PV array and -10 with it included. For details on PV array, see the Annual Production Report in Appendix 10.

The project will also meet the highest EnergyStar Standard requirements, as well as the indoor airPlus and WaterSense programs.

## Healthy Homes

In keeping with the green building criteria, all materials are selected to provide and maintain high indoor air quality and minimize negative environmental effects. Only materials free of hazardous chemicals, with low VOC content, which do not harbor moisture and are easily cleaned, will be utilized. Partitions will be constructed to provide sound control within and between units.

## Site + Landscape

Site planning takes advantage of the opportunities granted by the sloping terrain, and includes several dynamic public, semi-public and private outdoor spaces that enhance the experience of living in this special neighborhood. The landscape is designed to strengthen and give further definition to the unique urban fabric of Highland Park, while prioritizing the goals of green development and cooperative living.

The streetscape is healed and enhanced with street trees and raised planters which anchor the development to a pedestrian scale, and provide space for street trees every 25 feet. Native and adaptive shrubs and perennials adorn the planters and provide four season interest. Site walls will be reclaimed stone from site excavation, used to retain the grades adjacent to the rowhouses.



*Roofs cascade down the hill, oriented to the sun and street slope.*

## DESIGN

Private terraces behind each unit have permeable pavers and are secured with privacy fences. Plantings behind the terraces soften edges and create warm and comfortable outdoor spaces for residents. Here children can play and families can enjoy time outdoors. Accessible units have small side private patios at kitchen entries and private decks off first floor bedrooms at the rear because the grade slopes steeply away.

Semi-public spaces are between and behind the rowhouses. Nestled behind the largest cluster, we propose a central meadow planted with native and shade tolerant grasses, with picnic tables, for residents to enjoy an outdoor picnic, and children

to play. Terraced outdoors space behind the accessible rowhouses is also semi-public. Parking areas have permeable pavers to decrease stormwater runoff. The three parking areas on Parcel 2B hold nine parking spaces, and two are provided at 2A, resulting in 0.79 spaces for the fourteen units. Assuming the accessible units each have one dedicated parking space, 0.75 spaces are available for the units on Parcel 2B. Two of the three parking areas have adjacent bike storage sheds for 14 bicycles. Private yards offer additional bicycle storage opportunities for individual units. Trash and recycling will be managed individually by each unit, with barrel storage located in private rear yards.



Landscape plan showing street trees, private patios, the Fort Hill Link, community garden and woodland garden



*A two unit rowhouse has four bedroom accessible units with adjacent parking spaces*

The proposed public spaces include the Fort Hill Link connecting Highland, Marcella and Beech Glen Streets, a community garden and a woodland garden. They are described in detail in Community Amenities + Engagement.

Accessibility, storm water management and functionality guided site design. The community garden at Beech Glen is accessible with raised beds located near the entry providing accessible open space.

Stormwater management has been maximized on site with Low Impact Development (LID) techniques, using permeable paving and bioswales where possible, to slow down run off and encourage infiltration. A bioswale behind the accessible town house units will be constructed along the slope to encourage runoff and to allow plants to clean the water while slowing down run off along the slope.

Native and adaptive plants mitigate effects of urban development and to improve site ecology because they are drought resistant and promote bio diversity while creating important wildlife habitat. Species that perform well on slopes will

be included to hold the slope, retaining valuable nutrients in top soil. Existing mature healthy non-invasive trees will be protected as possible. Removed trees will be replaced by native trees.



*Accessible four-bedroom rowhouses, first and second floors*



RAIN WATER STORAGE



SOLAR ELECTRIC PANELS



HEAT RECOVERY VENTILATION (HRV)



HEAT PUMP HOT WATER HEATER



WATER SENSE PLUMBING



VARIABLE REFRIGERANT FLOW (VRF) HVAC



SOLAR SHADING



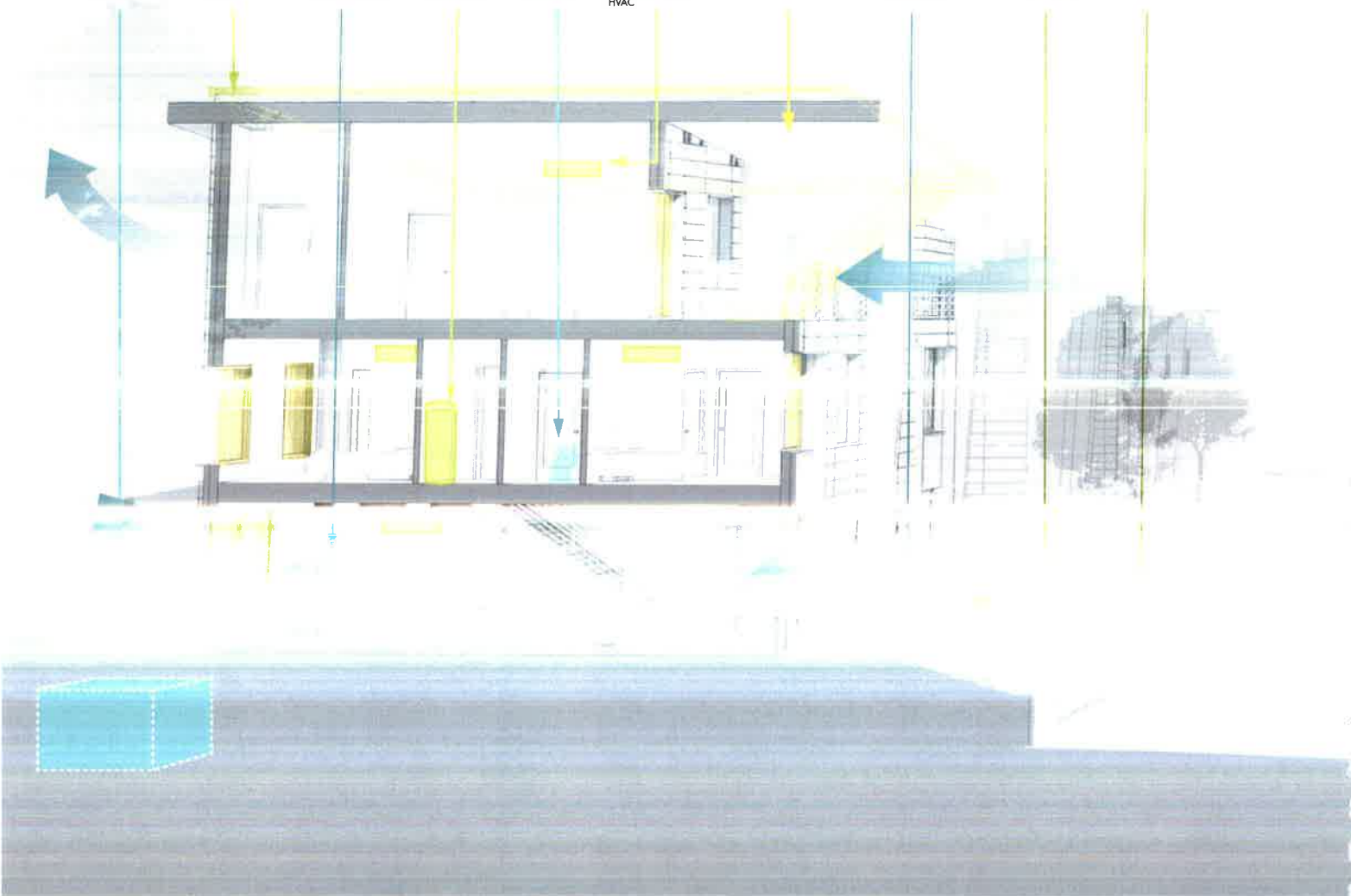
NATURAL VENTILATION



CHARGING STATIONS



BIKE STORAGE





SUSTAINABLE LANDSCAPES



TRIPLE PANE WINDOWS



VARIABLE REFRIGERANT FLOW (VRF) HVAC



SOLAR ELECTRIC PANELS



ENERGY STAR APPLIANCES



WATERSENSE PLUMBING



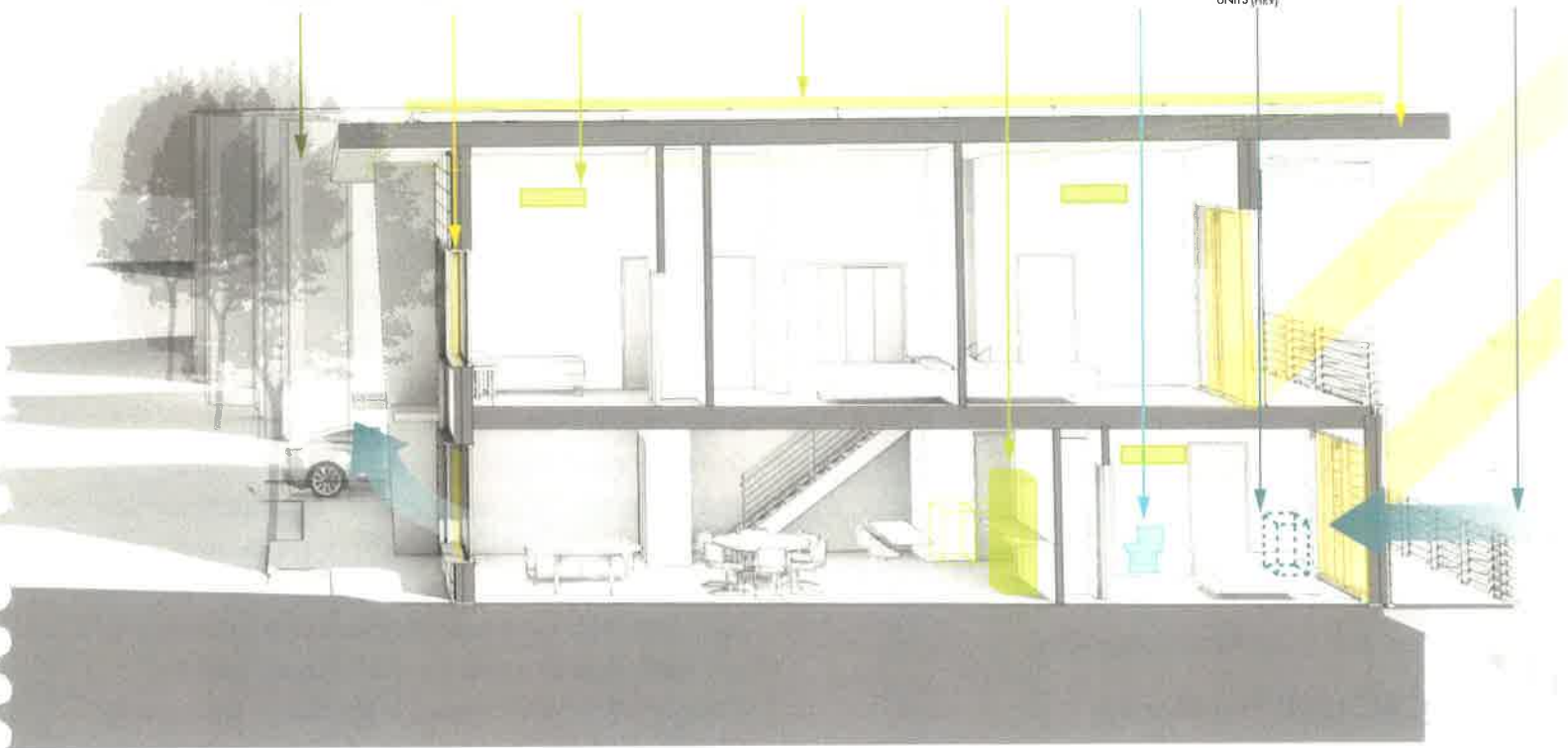
HEAT RECOVERY VENTILATION UNITS (HRV)



SOLAR SHADING



NATURAL VENTILATION



# CARBON NEUTRAL VISION + GREEN BUILDING

# CARBON NEUTRAL VISION + GREEN BUILDING

## Summary

The proposed buildings were designed with a holistic, sustainable approach to generate an energy positive project that meets Passive House requirements and LEED Platinum, exceeds Energy Star, and establishes a new benchmark for urban, sustainable living. The design targets Net Energy Positive, producing more energy than the building consumes on an annual basis.

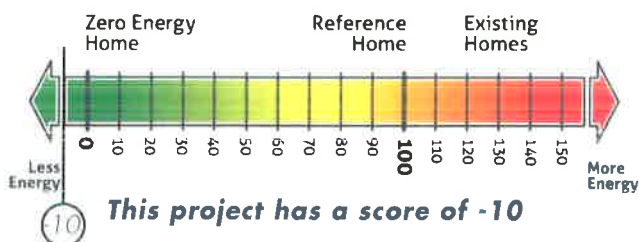
Energy positive and near-net zero high performance buildings with extremely low annual utility bills will be a significant benefit to homeowners and, increasingly, a marketing differentiator as shown by the rapid sale of already built E+ homes.

Based on optimized building envelopes, our engineering team was able to decrease the HVAC system size to meet the low building energy demands. With the roof-mounted PV system, the design achieves the E+/Net Energy Positive target. The project will meet the highest EnergyStar Standard requirements, as well as the indoor airPlus and WaterSense programs.

## USGBC LEED For Homes

The project is designed to achieve the USGBC LEED for Homes v4 Multifamily Lowrise Platinum Certification with 89 points out of 110. The project team will work with the LEED for Homes Green Rater and USGBC to ensure the design and construction meets the project goals through preliminary rating and construction verification.

Refer to the LEED Checklist in Appendix 10.

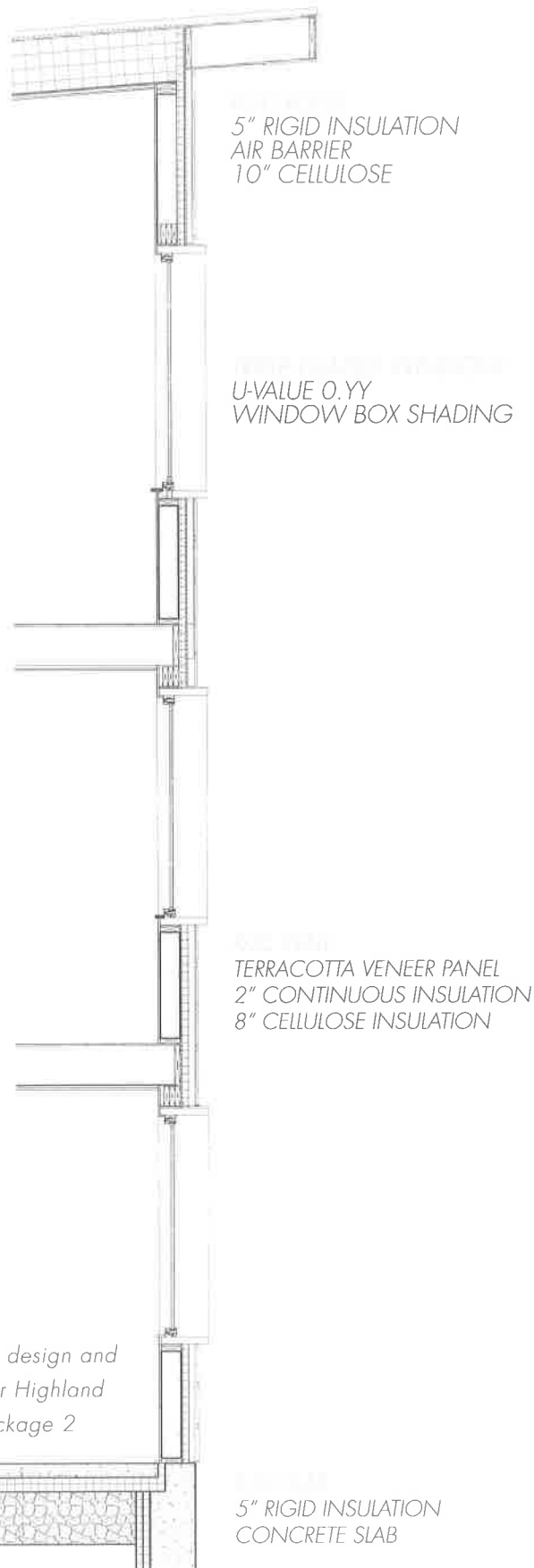


## Low Energy Design

The design team utilized Passive House Building design principals, which require a rigorous level of energy efficiency to meet the specific comfort level with five building science based principles: continuous insulation without thermal bridging, extremely airtight building envelope, high performance windows and doors, continuous heat recovery ventilation system with a minimal space conditioning system, and balanced glazing amount for minimum heating and cooling with HVAC system.

The HVAC system consists of VRF units, with an HRV for continuous ventilation for each rowhouse. The VRF system includes both ducted and wall-mounted units that will allow for independent heating or cooling based on the resident's comfort. VRF technology captures waste heat from the system piping to maximize efficiency and is significantly more energy-efficient than a traditional system. Condensers are located to minimize sound to the neighborhood and reduce structural loads. Ventilation is provided per rowhouse to avoid vertical ducting and fire dampers. Kitchen exhaust is ducted to the exterior with exterior dampers selected to minimize drafts. The Zehnder Comfotube distribution system is easily installed within stud cavities to minimize impact to the interiors. Domestic hot water is provided by an electric heat-pump water heater per rowhouse, located on the 2<sup>nd</sup> floors to minimize piping runs and losses.

Studio G utilized energy modeling tools such as WUFI Passive and REM/Rate, to achieve the well balanced low energy building design, and our HERS Rater used Ekotrope to analyze cost optimization for building envelope and system components.



*Sustainable design and detailing for Highland Park E+ Package 2*

All rowhouses are individually metered for water and electricity, and will allow for efficient data tracking to be shared with utilities and a web-based system to promote individual user tracking and aid in further energy use reductions through behavior.

The project will include high-speed data connections as well as telephone and cable for individual unit connections.

### **Passive House**

The design team worked closely with the HERS/PHIUS+ rater and a certification team at Passive House US to optimize the building envelope and systems to meet the climate specific energy requirements of PHIUS + 2015 standards that will use approximately 75-85% less heating energy and over 40% less energy for cooling when compared to a code-compliant building. Through WUFI-Passive analysis, the project is designed to eliminate moisture concerns within the building envelope.

The design followed rigorous Passive House principles to create an extremely comfortable living environment in all seasons due to no drafts, very narrow temperature variations within the space, and balanced heat recovery ventilation that delivers superb indoor air quality. Buildings meeting Passive House certification have been documented to improve occupant health, especially for those with allergy and respiratory problems. This is critically important when designing homes for moderate to low-income residents, as in this project.

The PHIUS+ Feasibility Study is in Appendix 10.

### **Hygrothermal Analysis**

A Hygrothermal analysis of a building envelope assesses the hygrothermal behavior of a building's

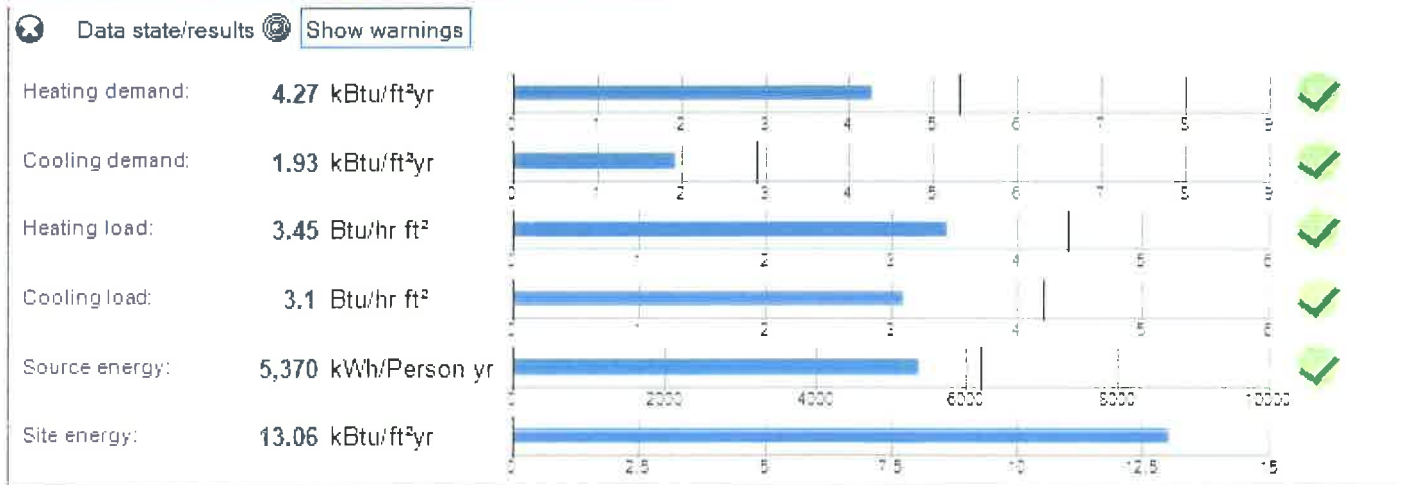
# CARBON NEUTRAL VISION + GREEN BUILDING

individual components, specifically its mold growth potential. Passive Houses are considered extremely low energy and require high R-values and an air tight building envelope. Higher insulation levels reduces mold risk on the interior surface, however, it lowers the drying potential of the assembly – increasing mold growth. Air tight construction increases mold risk due to the higher relative humidity indoors. Thus, it is critical to analyze the mold growth risk for high performance buildings. We used the WUFI Passive/WUFI Plus program to assess the mold risk on key building envelope components.

Refer to the Hygrothermal Analysis in Appendix 10 for more information and graphics.

## Energy Star

In addition to meeting the PHIUS+ requirements



WUFI passive analysis models each part of the proposed building design for energy loss and air infiltration

and achieving LEED Platinum, the project will exceed the Energy Star Standard Version 3.1 as defined by the EPA. The current version is designed to achieve 15% or more energy savings relative to the 2012 IECC. All units in the complex are achieving negative HERS index, and meeting or exceeding the referenced system for HVAC & plumbing systems, infiltration goals, and lighting fixtures. Construction will be reviewed and verified by the certified HERS rater.

All appliances will be provided as part of the development and will meet or exceed Energy Star requirements, including refrigerators, electric ranges, dishwashers, washing machines and heat-pump dryers. Appliances will also meet DND requirements.

## Net Positive

The 94.9kw roof-mounted solar panel array is designed to produce more energy than the annual demand for the building, made possible by the optimal building envelope design and minimal HVAC system. All systems are electric, eliminating fossil fuel use. The building has achieved a preliminary HERS Index of -10, which will be verified through testing and review by our HERS Rater. Refer to HERS Rater Certificates and PV Annual Production Report in Appendix 10.





## Microgrid Opportunity

Because the project will generate more electricity than needed on an annual basis, a micro-grid can be explored. A micro-grid consists of a localized group of electricity sources (solar panels + batteries) and loads (like a housing neighborhood) that normally operates connected to and synchronous with the centralized utility grid but can also disconnect to “island mode” and function autonomously as physical and/or economic conditions dictate. One of the most popular benefits of a micro-grid is the ability to maintain power in the event of a utility power outage because the micro-grid can temporarily disconnect from the main utility grid while relying on the solar + battery storage technology to power the homes. Then, when utility power is restored, the micro-grid can re-connect to the main grid for normal operation. The duration of the micro-grid’s ability to self-power will depend on the amount of solar + battery storage installed, and the number of loads needing power within the micro-grid. Revision Energy has agreed to join our team to design and install photovoltaic (solar electric)

panels, and to explore the micro-grid approach.

The E+ Marcella Street project may be a viable micro-grid opportunity depending on the local utility grid architecture. If possible, a micro-grid might include the rooftop solar electric arrays, battery storage and electric vehicle charging stations. Battery storage is not currently included in the development, but can be added if a micro-grid is found to be feasible.

## Carbon Neutral

The team is dedicated to reducing the impact from buildings on the environment and to design a new model in meeting the City of Boston’s Climate Action Plan. This plan aims to reduce greenhouse gas emissions by 25 percent (below 2005 levels) by 2020 and achieve carbon neutrality by 2050. By designing to meet Passive House and optimizing the performance beyond that to net positive, the design will offset approximately 116,146 lbs of carbon pollution each year, or the amount of CO<sub>2</sub> emissions from 20 average US homes.

## CARBON NEUTRAL VISION + GREEN BUILDING

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### Climate Resilience

In support of the City of Boston's Climate Ready Boston initiative, the team has focused efforts on implementing climate resilience strategies into the project. The LID (Low Impact Development) strategies used on our project will reduce impacts on the municipal water systems. Rainwater will be captured onsite and used for irrigation of shared landscape. Because of the high thermal performance of the building envelope, stable thermal comfort is possible in extended power outages. Micro-grid possibilities will be explored to further mitigate impacts to the grid.

Resilience is more than just mitigating flooding or drought conditions. Boston's resiliency challenges extend into the economic and educational inequalities present in our city. The project team includes partners such as Youthbuild to provide construction and design assistance on green infrastructure components. Their efforts will build workforce development and youth empowerment as well as continue to engage the neighborhood throughout construction.

Another opportunity exists with respect to community connectivity and health which is tied to a resilient city. The community gardens and woodland paths can serve as a place to gather and reflect during significant events such as community trauma from violence or storms.

### Indoor Air Quality

One of the principals of passive house design is to build a tight building envelope with balanced ventilation system. A tight envelope can prevent condensation and mold issues and inhibit polluted air infiltration into the building. Balanced heat recovery ventilation will bring in fresh air through high quality filters while recovering heat from extracted from air exiting the buildings. The building design will achieve airPLUS Qualification through the EPA as a pre-requisite for Energy

Star Certification. It requires controls on moisture and soil gas, an HVAC system with air tight clean ducts and high-quality filter, put strict regulations for fuel burning heating appliances, advocates low (zero when possible) emission interior finish material. Our design has eliminated fossil fuel combustion from the site, which will further enhance the indoor air quality.

### Material Selection

The study shows we spend 90% of time indoors. We strive to choose healthy material for well-being of the occupants. Along with our well-ventilated design, it is another opportunity to make the living space healthier. We reference standards such as the Redlist from Living Building Futures Institute and Cradle to Cradle certification for healthy indoor materials, as well as select materials to be responsibly harvested or rapidly renewable sources where feasible. Interior cabinetry and counters will be selected that are free of added formaldehyde, and materials such as finishes and adhesives will be low-or noVOC.

For the exterior, the materials have been selected to maximize efficiency, durability and reduce the impact on the environment. Wall cavity insulation will be open cell spray foam, which has a low global warming potential. Terracotta rainscreen panels are extremely durable, require little maintenance and do not require refinishing. The team is exploring both fiberglass and uPVC windows & doors to provide the most cost-effective solutions that will maximize performance.

### Low water usage

We understand the water is a finite resource and many US communities face the water supply challenge. All residential plumbing fixtures will carry WaterSense labels, using less water than what LEED v4's requires. For hot water use, we plan to install adapters to shower heads, faucets

that reduces water and energy waste while users briefly wait for hot water. It has seen a great success in New York City public housing to save energy for Domestic Hot Water.

## **Non-Personal Vehicle Means of Travel**

Transportation and traffic congestion is one of the many issues the City of Boston faces. Providing a shared vehicle program on site will ease the problem and contribute to meet city's CO2 emission goals. We can provide a shared car space if desired by the neighborhood. Residents of the project will have easy access to two existing Hubway Stations at Jackson and Roxbury Crossing MBTA Stations.

To promote electric vehicle use when personal cars are used, a charging station will be explored at an exterior parking space for use by project residents.

## **Education**

YouthBuild is part of our team because of their deep connections in the neighborhood and our long relationship with them. We'll engage Michael Chavez and the Designery staff in helping to design, and the YouthBuild students in helping to build, landscape structures on the site and possibly the roof.

Studio G is creating a program with YouthBuild to assist the Designery staff to develop Revit skills, essential for professional advancement.

Educating homeowners is a part of the strategies to achieve ongoing energy saving as designed. We are working with Wegowise, a local utility tracking software company, to provide each homeowner access to their own energy use. This also will be connected to the smart thermometer that homeowners can control from their smart phones. The entry area will also have a screen showing live and historic data of PV's production on the roof. This is a great educational tool for the residences

as well as neighboring community for future renewable energy strategies.

## **Replicability**

Designing and building energy positive housing will have the greatest impact if it can be easily reproduced. The buildings have been designed to utilize standard materials and methods for the building envelope such as conventional framing, spray foam insulation and sheathing. To advance the performance, the structure will be built with advanced framing techniques with open-cell spray foam in the cavities and an insulated sheathing (Zip-R). The specified mechanical and plumbing systems offer cutting edge efficiency that are off the shelf and readily available. Despite typical urban site constraints such as the non-optimal solar orientation of the site and the surrounding landscape and rocky topography, the project can achieve the high energy aspirations. The project is definitely replicable.



*Bartlett Station Housing Proposal/Studio G Architects*

# **DIVERSITY + INCLUSION**

## DIVERSITY + INCLUSION

We are committed to ensuring that our project promotes diversity and inclusion in the development process to the greatest extent possible. These efforts for diversity and inclusion will extend to the areas of:

- MBE/WBE members of the development/design team;
- Job training and hiring of minority and disadvantaged workers, including local youth for construction;
- Long term opportunities for local businesses, non-profits and workers; and
- Equal opportunity / diversity among residents in the new housing.

### Development/Design Team

Project Architect **Studio G Architects**, and Civil/Environmental Engineers, **CDW Consultants**, are WBE-certified businesses. Both have personnel who live in the neighborhood and are assigned to the project. Studio G's project team also reflects its commitment to diversity. Structural Engineer **Richmond So Engineers** is an MBE firm.

**YouthBuild Boston** will participate in the project in three ways. First, its Designery staff will work with the design team on designing the landscape structures. Second, participants in its Building Trades Exploration program will participate in on-site landscaping, including construction of community gardens and other landscape structures, as well as assisting in installation of rooftop photoelectric panels. Third, through its Pre-Apprentice program, which provides an avenue into the Building Trades, it will be able to place workers on the job. YouthBuild Boston's participants are primarily young people of color who will develop marketable skills through their participation in the project. Studio G and

YouthBuild Boston are developing an effort to increase the Revit skills of Designery staff to further their professional development in the design fields.



*YouthBuild Boston participants*

### Construction Team

For **Consigli Construction**, the project general contractor, diversity and inclusion are core elements of its corporate culture. Consigli employs a full-time diversity and community outreach manager who manages a robust MBE and WBE Outreach Program. In order to maximize participation by MBE and WBE subcontractors, Consigli incorporates its Outreach Program into all components of the construction process, including pre-project outreach, trade analysis, outreach and advertising, evaluation and bid comparison, and tracking.

With respect to hiring and training disadvantaged and local workers, Consigli has an exemplary track record in complying with the Boston Residents Jobs Policy. Consigli also has proven its willingness and ability to go beyond the BRJP to provide opportunities for low-income residents of Boston, typically through the Building Pathways program. For E+ Marcella-Highland, Consigli intends to work with YouthBuild Boston to provide placement opportunities for participants in YouthBuild's Pre-Apprentice program.

## On-Site Construction

To maximize local job opportunities, our project will utilize on-site construction rather than pre-fabricated or modular construction.

Development and Ownership. The mixed-income limited equity cooperative model upon which this development proposal is based provides ample opportunities for diversity and inclusion in areas of Development, Operations and Ownership. By virtue of the income mix, guaranteed by deed restriction, the residents of the mixed-income **limited equity cooperative** will to be economically diverse. It is anticipated that the cooperative will also be racially diverse. Insofar as the cooperative will have a meaningful long-term role in the development, as described elsewhere in this proposal, the residents of the cooperative will bring diversity to project Operations and Ownership.



Model Unit at Rice Mill / Rees-Larkin Development

**Rees-Larkin Development**, the project developer, is fully committed to providing equal opportunities in the marketing of all of its developments. Rees-Larkin Development has experience providing equal opportunity in the regulatory contexts that include HUD and Massachusetts DHCD. Moreover, the selected professional property management company, who will also serve as the marketing agent, will be experienced in the implementation of equal opportunity marketing.

Long-Term Operations. Once the project is completed and operating, the limited equity cooperative and the third-party property management agent will endeavor to provide affirmative opportunities for MBE, WBE, and local businesses who are potential vendors with respect to the provision of services to the property. Such services may include landscaping, maintenance and service contracts, cleaning contracts, snowplowing, accounting, and legal services. Affirmative action efforts will include outreach, active solicitation of MBE and WBE firms, and, to the extent possible, assistance to those firms in the bidding process.

Financing. As indicated by the attached letter of interest, the development intends to syndicate the low-income housing tax credits through the **Massachusetts Housing Equity Fund (MHEF)**, an affiliate of MHIC. Among tax credit finance entities, MHEF/MHIC, as a quasi-public entity, is the recognized leader in Massachusetts in the promotion of both MBE's and minority workforce participation in the construction of the developments that it finances.



*45 Townsend, in design/Studio G Architects*





# COMMUNITY AMENITIES + ENGAGEMENT

## COMMUNITY AMENITIES + ENGAGEMENT

### Community Amenities

The E+ Marcella Highland design responds to the expressed community interest in shared open space and amenities by reinforcing community connections on one of Boston's famous hills, and adding new community amenities. Consistent with the Rees-Larkin team's vision of combining Packages 2 and 4, the design proposes a vertical through-connection linking Highland, Marcella and Beech Glen Streets, all of which parallel the contours of Fort Hill. At Beech Glen it connects to a new community garden and the entry to Highland Park. The design also proposes a path from Marcella through woodlands, and possibly linking to Thwing Street if desired by residents.

These amenities are visions at this stage. The development team intends to hold design

charrettes with Highland Park neighbors and the city to solicit visions, ideas and concerns from abutters and other neighbors early in the design process to better develop the design of these community amenities. These public amenities are currently estimated at \$1 million. As the design concepts are further developed with the community, the development team will seek funding specific to such public open spaces.

The vision, if this team is selected for both parcels, includes the Fort Hill Link, Community Garden and Woodland Path, described below. If selected only for Package 2, the proposal includes only the portion of the link on Parcels 2A and B, as well as the Community Garden and Woodland Park. If selected only for Package 4, the proposal includes the portion of the link on Parcel 4.



*Overview shows connections between roads and new public green spaces*



*The Fort Hill Link connects Marcella Street to Beech Glen Street*

## The Fort Hill Link

Linking Parcels 2 and 4, a staired pedestrian path traverses the 100' slope from bottom to top and is illuminated by LED lighting for safety. Such a staired pedestrian route could help Highland Park residents more easily access their beloved Highland Park. Because the path cannot be made accessible, it will require Massachusetts Architectural Access Board approval.

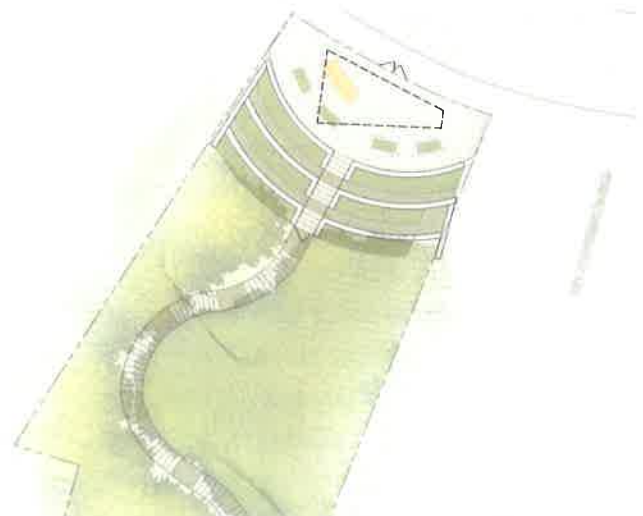
The public path originates at Highland Street on the west side of Parcel 4 (in Package 4 proposal). From there it climbs to the top of Parcel 4, and continues to Marcella Street along the west side of Parcel 2A. Across Marcella Street, the path picks up at the west end of Parcel 2B, and climbs the steep grade to proposed new community gardens on Beech Glen Street (in Package 2 proposal). This path creates an important pedestrian link between the upper and lower neighborhoods of this area of Highland Park. It provides desired connectivity, and puts public transit and public open space within a shorter walking distance of neighborhoods currently limited by circuitous

street configurations. Residents at the top of the hill will have a more direct route to the Jackson Square commercial and transit hub. Conversely, residents at the base of the hill will have easier access to iconic Highland Park with its open space and city views.

## Community Garden

The proposed new community garden is located on Parcel 2B, at the foot of Highland Park across Beech Glen Street, extending the public green space. This portion of the site is currently not heavily treed, requiring minimal tree removal. Universally accessible raised beds are located closest to the entrance, with garden plots terraced down the slope along a central path and stair. The entry to the garden is celebrated with a pergola that includes a community message board, helping to facilitate community engagement and connection. Storm water will be collected in below-ground tanks to be used for irrigation for planted areas.

The garden is secured with a fence and gate that defines its perimeter while offering an opportunity for controlled access if desired. Neighbors can access the staired path down to Marcella at the back of the community garden.



*A community garden and stepped path connects residents to Highland Park*

## COMMUNITY AMENITIES + ENGAGEMENT



### Woodland Garden Path

Parcel 2 includes a heavily wooded parcel at the end of Thwing Street. The design proposes a woodland garden and path to preserve and enhance the steeply sloped wooded area, by selectively removing invasive species and planting evergreen and deciduous woodland species native to Eastern Massachusetts. Sensitive to the existing mature native species of trees, the path is laid out to preserve the character of the woods and leads the visitor along a meandering path through the special forest. Shrub species will be planted to provide character and spatial interest during winter months. Educational and interpretive signage can be used to inform the visitor of the ecological importance of this woodland, its biodiversity and habitat, storm water management, resiliency and the indigenous geological science behind the “Roxbury Puddingstone” ledge. These public open spaces expand the passive recreational opportunities for Highland Park neighbors by providing places to sit or stroll within nature,

garden, and socialize with neighbors. The woodland path is open to the public at Marcella (Parcel 2) and can connect to Thwing, if desired by neighbors.

### Public Education: Carbon Neutrality

Public awareness is key to promote understanding of the imperative of carbon neutrality and the benefits of sustainable and energy positive design and construction. Our team will provide training to the neighborhood and broader community during construction, exploring the building and system components that achieve our goals. YouthBuild Boston will be a key team member in this process, as tour guides during open-wall tours along-side our architects, engineers and contractors. YouthBuild Boston members will learn much of the design intention and implementation and also be able to present some of their own work.

Once occupied, the development will share information on energy & water use as part of the EnergyStar Portfolio requirements and the project’s WegoWise web-based data collection system.

### Slow Streets

Highland Park is one of five communities in the city to join the Neighborhood Slow Streets Program. Our team will work closely with the neighborhood and the City of Boston to explore and implement the most effective traffic calming measures along Marcella Street.

### Car Share

The project will support car sharing with the inclusion of a publicly-accessible outdoor parking space for Zipcar located off of Marcella Street.



*YouthBuild participants learned how to build rain gardens through YBB's Building Trades Exploration Program. (photo: YouthBuildBoston)*



*45 Townsend, in design/Studio G Architects*

Rees-Larkin Development has only one other development project in planning: the Moran Square Redevelopment project. Located in Fitchburg, Massachusetts, Moran Square Redevelopment is a proposed 42-unit mixed-income project that will include the historic rehabilitation of two buildings and the new construction of a third building. Rees-Larkin Development has long-term site control of the project's three parcels through June 30, 2019. The project has secured a Special Permit from the City of Fitchburg, which permit expires on November 22, 2019. Rees-Larkin Development has no other projects currently under development.

# PERMITS + LICENSES



*Ex. Parker Terrace, Proposed/Studio G Architects*



The Applicant does not have any relationships with third-party developers, subcontractors, or community partners, other than those disclosed in this proposal (i.e. other than with the parties listed as development team members).

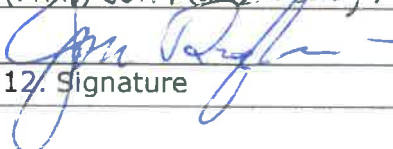
# **SUBCONTRACTORS + PARTNERSHIPS**



*GBNCC, Proposed affordable housing/Studio G Architects*

# APPENDICES

Appendix 1 – Cover Sheet Form

<b>SOLICITATION, OFFER AND AWARD</b>			
1. PROJECT NAME	2. TYPE OF SOLICITATION	3. Date Issued	
Marcella and Highland Streets	Invitation for Bids Negotiated (RFP)	November 13, 2017	
4. ISSUED BY: City of Boston, Department of Neighborhood Development 26 Court Street, 10 <sup>th</sup> Floor Boston, MA 02180		5. ADDRESS OFFER TO: (If other than item 4)	
<b>NOTE:</b> In sealed bid solicitations "offer" and "offeror" mean "bid" and "bidder"			
<b>SOLICITATION</b>			
6. Sealed offers (original and 3 copies) will be received at the place specified in item 4 until <b>4:00 p.m. (EST) February 14, 2018.</b> <b>CAUTION:</b> Late submissions, Modifications, and Withdrawals: See Section 10. All offers are subject to all terms and conditions contained in this solicitation.			
7. For Information Contact:	7a. Name	7b. Telephone	7c. Fax
	John Feuerbach	(617) 635-0353	(617) 635-0383
			7d. E-mail <a href="mailto:procurement@cityofboston.gov">procurement@cityofboston.gov</a>
<b>OFFER</b>			
8. In accordance with the terms of this RFP, the undersigned agrees, if this offer is accepted, to furnish any and all supporting documentation upon request by DND.			
<b>OFFER PRICE:</b>	\$1,011,000.00		
<b>9. SUBMISSION CHECKLIST</b>			
<input checked="" type="checkbox"/>	Appendix 1: COVER SHEET FORM	<input checked="" type="checkbox"/>	Appendix 6: AFFIDAVIT OF ELIGIBILITY
<input checked="" type="checkbox"/>	Appendix 2: PROPOSAL CHECKLIST	<input checked="" type="checkbox"/>	Appendix 6: CHAPTER 803 DISCLOSURE STATEMENT
<input checked="" type="checkbox"/>	Appendix 3: STATEMENT OF APPLICANT'S QUALIFICATIONS	<input checked="" type="checkbox"/>	Appendix 6: DISCLOSURE/BENEFICIAL INTEREST STATEMENT
<input checked="" type="checkbox"/>	Appendix 4: DEVELOPMENT TIMETABLE FORM	<input checked="" type="checkbox"/>	Appendix 6: PROJECT SUMMARY
<input checked="" type="checkbox"/>	Appendix 5: CONSTRUCTION EMPLOYMENT STATEMENT	<input checked="" type="checkbox"/>	Appendix 6: PROPOSAL FORM-PRICE
<input checked="" type="checkbox"/>	Appendix 6: PROPERTY AFFIDAVIT		
10. ADDRESS OF OFFEROR Rees-Larkin Development LLC 179 Boylston Street Jamaica Plain, MA 02130		11. Name and Title of Authorized Signatory (Print) Jon Rudzinski, Manager	
		12. Signature 	13. Offer Date 02/14/2018
14. Phone Number	617-838-9388		

## Appendix 2 – Proposal Checklist

### General Submission Requirements:

- ✓ 1 original and 4 application copies submitted
- ✓ Appendix 1: Cover Sheet Form
- ✓ Appendix 2: Proposal Checklist
- ✓ Proposal Summary and Narrative
- ✓ Appendix 3: Statement of Applicant's Qualifications Form
- ✓ Appendix 4: Development Timetable Form
- ✓ Appendix 5: Construction Employment Statement Form
- ✓ Appendix 6: DND Form Links- Property Affidavit Form
- ✓ Appendix 6: DND Form Links- Affidavit of Eligibility Form
- ✓ Appendix 6: DND Form Links- Chapter 803 Disclosure Statement Form
- ✓ Appendix 6: DND Form Links- Disclosure/Beneficial Interest Statement Form
- ✓ Appendix 6: DND Form Links- Project Summary
- ✓ Appendix 6: DND Form Links- Proposal Form- Price
- ✓ Certificate of Good Standing relating to the entity from the Massachusetts Secretary of State
- ✓ Pre-Development Sources and Uses Budget (w/ proof of cash availability)
- ✓ One Stop Application for Development Budget- Use Sections 1-7, including "Project Summary Information", "Rent Profile Analysis", "21-Year Operating Proforma" and "Operating Expense Analysis" and Development Cost Analysis"
- ✓ Evidence of Financing- Letter of Interest or Commitment Letter from an established Financial Institution
- ✓ Evidence of Acquisition of Privately-owned Land, if applicable
- ✓ Audited Financial Statement (most recent)
- ✓ Resumes of Development Team
- ✓ Design Submittal as outlined in Design Standards in DND website link
- ✓ LEED Checklist demonstrating LEED compliance strategy
- ✓ Green Narrative that addresses, at a minimum, Integrated Design Process, Green and LEED strategy and sources of green funding.
- ✓ Stable Occupancy- Narrative addressing "Stable Tenancy" requirement (see "General Guidelines")
- ✓ Narrative and response to "Diversity and Inclusion" requirement (see "General Guidelines")

## Appendix 2A

The Certificate of Good Standing issued by the Massachusetts Secretary of State for Rees-Larking Development LLC, ~~will be submitted under separate cover, prior to the submission deadline.~~



*The Commonwealth of Massachusetts*  
*Secretary of the Commonwealth*  
*State House, Boston, Massachusetts 02133*

William Francis Galvin  
Secretary of the  
Commonwealth

February 13, 2018

TO WHOM IT MAY CONCERN:

I hereby certify that a certificate of organization of a Limited Liability Company was filed in this office by

**REES-LARKIN DEVELOPMENT LLC**

in accordance with the provisions of Massachusetts General Laws Chapter 156C on **October 28, 2008.**

I further certify that said Limited Liability Company has filed all annual reports due and paid all fees with respect to such reports; that said Limited Liability Company has not filed a certificate of cancellation or withdrawal; and that said Limited Liability Company is in good standing with this office.

I also certify that the names of all managers listed in the most recent filing are: **JON R. RUDZINSKI**

I further certify, the names of all persons authorized to execute documents filed with this office and listed in the most recent filing are: **JON R. RUDZINSKI**

The names of all persons authorized to act with respect to real property listed in the most recent filing are: **JON R. RUDZINSKI**



In testimony of which,  
I have hereunto affixed the  
Great Seal of the Commonwealth  
on the date first above written.

*William Francis Galvin*  
Secretary of the Commonwealth





Appendix 3 – Statement of Applicant’s Qualifications

All questions must be answered. All information must be clear and complete. Attach additional pages, if needed.

- 1. Name of Applicant: Rees-Larkin Development LLC
- 2. Names and titles of principals: Jon Rudzinski, Manager  
and sole Member
- 3. Names of authorized signatories: Jon Rudzinski
- 4. Permanent main office address: 179 Boylston Street,  
Jamaica Plain, MA 02130  
Phone: 617-838-9388 Fax: N/A Email: JON@REES-LARKIN DEVELOPMENT.COM
- 5. Date organized: October 28, 2008
- 6. Location of incorporation: Massachusetts

- 7. Number of years engaged in business under your present name: 9
- 8. List at least three private or public agencies that you have supplied/provided with similar services to that in this solicitation:
  - a. Massachusetts D. H. C. D
  - b. City of Lowell Dept of Planning & Development
  - c. City of Pittsfield Dept of Comm. Development

Has organization ever failed to perform any contract?  YES  NO  
If YES, attach a written declaration explaining the circumstances.

AUTHORIZATION: The undersigned certifies under penalties of perjury that this proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Jon Rudzinski  
Signature of individual submitting application  
Manager

Title  
Rees-Larkin Development LLC  
Legal Name of Organization

02/11/2018  
Date

## Appendix 4 - Development Timetable

APPLICANT'S NAME: *Rees-Larkin Development LLC*

Assuming that you are designated in May 2018, indicate below your target dates for achieving these key development milestones.

MILESTONE	DATE
Designs Complete	July 31, 2018
Apply for Permit(s)	August 15, 2018
Zoning Relief Anticipated?	YES ← NO
All Development Financing Committed	May 31, 2019
Permit(s) Issued	November 30, 2018
Financing Closed	September 30, 2019
Construction Begins	October 1, 2019
Construction Complete	August 31, 2020

**Appendix 5 – Construction Employment Statement**

**APPLICANT'S NAME:** Rees-Larkin Development LLC

How many full time employees does your firm currently have?

Under 25                      25 -99                      100 or more

Are you a Boston-based business?      YES                      NO

*"Boston Based": where the principal place of business and/or the primary residence of the Applicant is in the City of Boston.*

Are you a Minority-owned Business Enterprise?      YES                      NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)?      YES                      NO

Are you a Woman-owned Business Enterprise?      YES                      NO

If yes, are you certified as such by the State Office of Minority and Women Business Assistance (SOMBWA)?      YES                      NO

**RESIDENT, MINORITY AND FEMALE CONSTRUCTION EMPLOYMENT**

The Boston Residents Jobs Policy requires developers to seek to achieve the following construction employment goals:

- Boston Residents      51% of project hours**
- People of Color        40% of project hours**
- Female                    12% of project hours**

Applications that provide evidence of their ability to achieve these targets will be more highly ranked. Explain what steps you will take to promote employment of these groups:

*Through the project general contractor, Consigli Construction, we will conduct aggressive outreach, advertising, and assistance directly to potential workers and to potential sub-contractors who would be best able to meet the goals.*

If you have additional information demonstrating your capacity to achieve these employment targets, you may provide this information on a separate sheet clearly labeled at the top with "Supplementary Construction Employment Statement" and the Applicant's name.

*Note: if you are, according the US Dept. of Housing & Urban Development, a Section 3 certified vendor, this will be considered strong evidence of capacity to achieve DND's employment goals.*

If you have completed any development projects in the last five years that have required employment reporting through the City's Office of Jobs & Community Services, please list the most recent here:

**City of Boston (COB) – Property Affidavit Form**

**Instructions:** List all City of Boston properties currently owned, or previously foreclosed upon for failure to pay real estate taxes or other indebtedness, by the applicant or by any other legal entity in which the applicant has had or now has an ownership or beneficial interest. If there are any past due amounts owed to the Department of Neighborhood Development, the Inspectional Services Department, the Treasury Department and/or the Boston Water and Sewer Commission, such **must be paid in full** before: (1) a vote request can be presented to the City of Boston Public Facilities Commission concerning the sale of property to the applicant or any other business entity in which the applicant has an ownership or beneficial interest; OR (2) the commitment of funding to the applicant or any other business entity in which the applicant has an ownership or beneficial interest. Public Facilities Commission votes are not to be requested until the Property Affidavit has been approved and the Legal Unit has signed the Property Clearance Form.

Upon approval, the Property Affidavit will be valid for ninety (90) calendar days from the date it is signed by the Applicant.

For any additional properties that do not fit on this form, attach a spreadsheet. Do not use another property affidavit form. Only one signature page is to be submitted. All entries made on this form must be typed in the form fields provided below.

**Applicant:** Rees-Larkin Development LLC

List Addresses of Boston Properties Owned:	PARCEL ID NUMBER
NONE	
Boston Properties Previously Foreclosed Upon by COB:	PARCEL ID NUMBER
NONE	

I declare under pains and penalties of perjury that the foregoing representations are true, accurate, complete and correct in all respects.

Jon Rudzinski, Manager

Print Name and Title

Authorized Representative's Signature

3/13/2013

Date

617-838-9388

Applicant Contact (If different from above)

Telephone Number

**OFFICIAL USE ONLY** (Fax the completed form to DND at 635-0262.

Delinquency Reported: (If Yes (Y) state the amount owed):

**Boston Water & Sewer Commission**

Y \$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes: \_\_\_\_\_

**Department of Neighborhood Development**

Y \$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes: \_\_\_\_\_

**Public Works Department**

Y \$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes: \_\_\_\_\_

**Treasury Department**

Y \$ \_\_\_\_\_ N

Signature and Date: \_\_\_\_\_

Notes: \_\_\_\_\_

DND Contact

Division

Program

Phone: ext.

**AFFIDAVIT OF ELIGIBILITY FORM**

Developer's Name: Rees-Larkin Development LLC

Any person submitting an application for under this RFP must truthfully complete this Affidavit and submit it with their application.

1. Do any of the principals owe the City of Boston any monies for incurred real estate taxes, rents, water and sewer charges or other indebtedness?

No.

2. Are any of the principals employed by the City of Boston? If so, in what capacity? (Please include name of principal, name of agency or department, and position held in that agency or department).

Jon Rudzinski, Manager and sole Member of Rees-Larkin Development LLC is employed on a part-time seasonal basis as the Girls Soccer Coach at Boston Latin School.

3. Were any of the principals ever the owners of any property upon which the City of Boston foreclosed for his/her failure to pay real estate taxes or other indebtedness?

No.

5. Have any of the principals ever been convicted of any arson-related crimes, or currently under indictment for any such crime?

No.

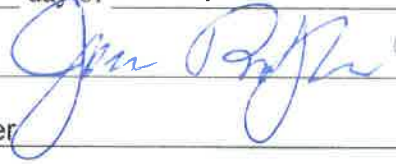
6. Have any of the principals been convicted of violating any law, code, statute or ordinance regarding conditions of human habitation within the last three (3) years?

No.

Signed under the pains and penalties of perjury this

10th day of February, 20 18

SIGNATURE: \_\_\_\_\_



TITLE: Manager

ORGANIZATION: Rees-Larkin Development LLC

ADDRESS: 179 Boylston Street, Jamaica Plain, MA 02131

## CHAPTER 803 DISCLOSURE STATEMENT FORM

In compliance with Chapter 60, Section 77B of the Massachusetts General Laws as amended by Chapter 803 of the Acts of 1985, I hereby certify that I have never been convicted of a crime involving the willful and malicious setting of a fire or of a crime involving the fraudulent filing of a claim for fire insurance; nor am I delinquent in the payment of real estate taxes in the City of Boston, or being delinquent, an application for the abatement of such tax is pending or a pending petition before the appellate tax board has been filed in good faith.

This statement is made under the pains and penalties of perjury this 10th day  
of February, 2018  
Month Year

  
Proposer Signature

\_\_\_\_\_  
Co-Proposer Signature (If Applicable)

Disclosure Statement Concerning Beneficial Interests as  
Required by Article 80, Section 80B-8, of the Boston Zoning Code

- (1) Name of Project: E+ Marcella/Highland 2
- (2) Location: 108 Marcella St. et al; 93 Marcella St. et al
- (3) Applicant: Rees-Larkin Development LLC
- (4) I hereby state, under the penalties of perjury, that the true names and addresses of all Persons who have a Beneficial Interest (including the amount of their Beneficial Interest accurate to within one-tenth of one percent if such interest exceeds one percent) in the above-listed property are listed below in compliance with the provisions of Article 80, Section 80B-8, of the Boston Zoning Code.

NAME AND RESIDENCE OF EACH PERSON WITH SAID BENEFICIAL INTEREST (continue on separate sheet if necessary):

	<u>Percentage Interest</u>
NAME: <u>Jon Rudzinski</u>	<u>100.0%</u>
ADDRESS: <u>9 Lilac Terrace Roslindale 02131</u>	
NAME: _____	
ADDRESS: _____	
NAME: _____	
ADDRESS: _____	
NAME: _____	
ADDRESS: _____	

ARTICLE 80 - DEVELOPMENT REVIEW AND APPROVAL



- (5) The undersigned also acknowledges and states that except as stated below, none of the above-listed individuals is an official elected to public office in the Commonwealth of Massachusetts, nor is an employee of the State Department of Capital Planning and Operations.
- (6) I hereby state, under the penalties of perjury, that the names and addresses of all firms and professional corporations employing attorneys, real estate brokers, architects, engineers, planners, or surveyors, and all other agents who have acted on behalf of any of the foregoing with respect to the application for Zoning Relief on the above-listed property are listed below in compliance with the provisions of Article 80, Section 80B-8, of the Boston Zoning Code.

**NAMES AND ADDRESSES OF ALL FIRMS AND PROFESSIONAL CORPORATIONS, AND AGENTS WHO HAVE ACTED ON SAID APPLICATION (continue on separate sheet if necessary):**

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

*ARTICLE 80 - DEVELOPMENT REVIEW AND APPROVAL*

SIGNED under the penalties of perjury.

Signature: Jon Rudzinski

Name Printed: Jon Rudzinski

Date: 02/10/2018

ARTICLE 80 - DEVELOPMENT REVIEW AND APPROVAL

### Project Summary Form

Project Name: E+ Marcella/Highland 2  
 Project Street Address(es): 108 Marcella Street et al & 93 Marcella Street et al; Roxbury  
 Developer: Rees-Larkin Development LLC  
 Types of Units: Family  Individuals  Elderly  Special Needs   
 Other? (Describe) 2 ADA Units Commercial  Yes  No  
 Number of Units 14 Number of Affordable Units 9 Homeless Units     

Number of Units	SRO	Studio	1-Bdr	2-Bdr	3-Bdr	4-Bdr	Total
<30% AMI					1		1
<60% AMI					4	1	5
<80% AMI					2	1	3
Market					5		5

Rents	SRO	Studio	1-Bdr	2-Bdr	3-Bdr	4-Bdr
<30% AMI					710.00	
<60% AMI					1,500.00	1,675.00
<80% AMI					2,575.00	2,875.00
Market					3,100.00	

**Housing Budget**

TDC:	\$ _____	TDC Per Unit:	\$ _____
Hard Cost/sf	\$ _____	Hard Cost/unit	\$ _____
Operating Exp/unit	\$ <u>9,306.00</u>	Reserves/unit	\$ <u>500.00</u>
		Developer Fee and Overhead	\$ <u>857,828.00</u>

**Funding Sources:** (Check all that apply)

- |                  |                                     |             |                                     |                 |                                     |                 |                                     |
|------------------|-------------------------------------|-------------|-------------------------------------|-----------------|-------------------------------------|-----------------|-------------------------------------|
| DND – HOME       | <input type="checkbox"/>            | DHCD-HOME   | <input type="checkbox"/>            | DHCD-CIPF       | <input type="checkbox"/>            | Others:         | <input checked="" type="checkbox"/> |
| HSNG BOSTON 2030 | <input type="checkbox"/>            | DHCD-HSF    | <input checked="" type="checkbox"/> | 9% LIHTC        | <input checked="" type="checkbox"/> | DND             | <input checked="" type="checkbox"/> |
| NHT              | <input type="checkbox"/>            | DHCD-HIF    | <input type="checkbox"/>            | 4% LIHTC        | <input type="checkbox"/>            | Mass CRC        | <input checked="" type="checkbox"/> |
| IDP              | <input type="checkbox"/>            | DHCD-TOD    | <input type="checkbox"/>            | New Market TC   | <input type="checkbox"/>            | NPV of PV       | <input checked="" type="checkbox"/> |
| FHLB             | <input type="checkbox"/>            | DHCD-CATNHP | <input type="checkbox"/>            | Historic TC     | <input type="checkbox"/>            | Boston Prv. Bk. | <input checked="" type="checkbox"/> |
| AHTF             | <input checked="" type="checkbox"/> | DHCD-CBH    | <input type="checkbox"/>            | MA State TC     | <input checked="" type="checkbox"/> | _____           | <input type="checkbox"/>            |
| MTC Grants       | <input type="checkbox"/>            | DHCD-FCF    | <input type="checkbox"/>            | HUD-Section 202 | <input type="checkbox"/>            |                 |                                     |

**PROPOSAL FORM**

**SUBMITTED TO: DEPARTMENT OF NEIGHBORHOOD DEVELOPMENT  
BID COUNTER  
26 COURT STREET, 10<sup>TH</sup> FLOOR  
BOSTON, MASSACHUSETTS 02108**

**DATE RECEIVED BY DND:** February 14, 2018

**SUBMITTED BY: NAME:** Rees-Larkin Development LLC

**ADDRESS:** 179 Boylston Street, I.P. 02130

**TELEPHONE:** 617-838-9388

**EMAIL:** jon@rees-larkindevelopment.com

Under the conditions set forth by the Department of Neighborhood Development, the accompanying proposal is submitted for:

**Property Address:** 108 Marcella St. et al & 93 Marcella St. et al, Roxbury (see att'd)

For this proposal to be properly evaluated all questions must be answered by the Proposer. The Awarding Authority (the Department of Neighborhood Development) will regard all responses to questions and all submissions as accurate portrayals of the Proposer's qualifications and any discrepancy between these statements and any subsequent investigation may result in the proposal being rejected.

- i. The name(s) and address(es) of all persons participating in this application as principals other than the undersigned are:

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Use separate sheet and attach if additional principals are involved.

- ii. The applicant is a/an:  
Limited Liability Company  
(Individual/Partnership/Joint/Venture/Corporation/Trust, etc.)

A. If applicant is a Partnership, state name and residential address of both general and limited partners: Manager and Sole Member: Jon Rudzinski, 9 Lilac Terrace, Roslindale, MA 02131

## **PROPOSAL FORM**

### **Supplemental Information**

#### List of Property Addresses:

108 Marcella Street, Roxbury

110 Marcella Street, Roxbury

112 Marcella Street, Roxbury

114 Marcella Street, Roxbury

93/95 Marcella Street, Roxbury

97 Marcella Street, Roxbury

101 Marcella Street, Roxbury

105 Marcella Street, Roxbury

109 Marcella Street, Roxbury

113 Marcella Street, Roxbury

115 Marcella Street, Roxbury

121 Marcella Street, Roxbury

123 Marcella Street, Roxbury

125R Marcella Street, Roxbury

Beech Glen Street, Roxbury

Thwing Street, Roxbury

B. If applicant is a Corporation, state the following:

Corporation is incorporated in the State of: \_\_\_\_\_

President is: \_\_\_\_\_

Treasurer is: \_\_\_\_\_

Place of Business: \_\_\_\_\_

C. If applicant is a Joint Venture, state the names and business addresses of each person, firm or company that is a party to the joint venture:

\_\_\_\_\_  
\_\_\_\_\_

A copy of the joint venture agreement is on file at: \_\_\_\_\_ and will be delivered to the Official on request.

D. If applicant is a Trust, state the name and residential address of all Trustees as:

\_\_\_\_\_  
\_\_\_\_\_

Trust documents are on file at \_\_\_\_\_

And will be delivered to the Official on request.

iii. Bank reference(s): \_\_\_\_\_

iv. If business is conducted under any title other than the real name of the owner, state the time when, and place where, the certificate required by General Laws, c.110, §5 was filed:

v. Number of years organization has been in business under current name: \_\_\_\_\_

vi. Has organization ever failed to perform any contract? \_\_\_\_\_ Yes/No

If answer is "Yes", state circumstances): \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

We propose the following purchase price: \$ 1,011,000.00

vii. AUTHORIZATION:

The undersigned certifies under penalties of perjury that this proposal has been made and submitted in good faith and without collusion of fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

[Signature]  
Signature of individual submitting proposal  
Manager

Title  
Rees-Larkin Development LLC  
Legal Name of Organization

Dated at: \_\_\_\_\_

This 13<sup>th</sup> day of February, 2018

NAME OF ORGANIZATION:  
Rees-Larkin Development LLC

BY: Jon Rudzinski  
TITLE: Manager

i. ATTESTATION:

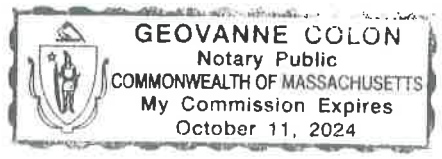
Jon Rudzinski being duly sworn deposes and says that  
(he/she) is the Manager of Rees-Larkin Development LLC and that all  
answers to foregoing questions and all statements contained herein are true and correct.

Subscribed and sworn before me this 13 day of February 2018

Notary Public: [Signature]

My Commission Expires: February 13, 2018  
(Month) (Year)

NOTE: This proposal form must bear the written signature of the applicant.



If the applicant is an individual doing business under a name other than his own name the application must state so, giving the address of the individual.

If the applicant is a partnership a partner designated as such must sign the application.

If the applicant is a corporation, trust or joint venture the application must be signed by a duly-authorized officer or agent of such corporation, trust or joint venture and contain written evidence of the authority to bind the entity.

(Please include the name of the agency or department and position held in that agency or department.)





# CITY OF BOSTON JOBS AND LIVING WAGE ORDINANCE

THE LIVING WAGE DIVISION • (617) 918-5259

## BENEFICIARY AFFIDAVIT

Any for-profit Beneficiary who employs at least 25 full-time equivalents (FTE) or any not-for-profit Beneficiary who employs at least 100 FTEs who has been awarded Assistance of \$100,000 or more from the City of Boston must comply with the **First Source Hiring Agreement** provisions of the Boston Jobs And Living Wage Ordinance.

*If you are submitting a Request for Proposal, Request for Qualification, or Invitation for Bid, or negotiating a loan, grant, or other financial Assistance that meets the above criteria, you must submit this Affidavit along with your proposal. If you believe that you are exempt from the First Source Hiring Agreement provisions of the Boston Jobs And Living Wage Ordinance, complete Section 4: Exemption: First Source Hiring Agreement provisions, or if you are requesting a General Waiver, please complete Section 5: General Waiver Reason(s).*

**IMPORTANT:** Please print in ink or type all required information. Assistance in completing this Form may be obtained by calling The Living Wage Administrator, The Living Wage Division of the Office Of Jobs And Community Services, telephone: (617) 918-5259, facsimile: (617) 918-5299.

### Part 1: BENEFICIARY OF ASSISTANCE INFORMATION:

Name of Beneficiary: Rees-Larkin Development LLC

Contact Person: Jon Rudzinski

Address: 179 Boylston Street, Jamaica Plain, MA 02130

Telephone #: 617-838-9388 Fax #: n/a

E-Mail: jon@rees-larkindevelopment.com

### Part 2: ASSISTANCE INFORMATION:

Name of the program or project under which the Assistance is being awarded:  
Project: E+ Marcella/Highland 2 (response to RFP); Program: to be determined

Awarding Department: DND

Bid or Proposal Amount: \$tbd

Date Assistance Documents Executed: tbd Award End Date: tbd

Duration of Award:  1 year  2 years  3 years  Other: tbd (years)

**PART 3: ADDITIONAL INFORMATION**

Please answer the following questions regarding your company or organization:

1. Your company or organization is: *check one*:

For Profit  Not For Profit

2. Total number of employees whom you employ: 0

3. Total number of employees who will be assigned to work on the above-stated Award: 0

4. Do you anticipate hiring any additional employees?

Yes  No

*If yes*, how many additional F.T.E.s do you plan to hire? \_\_\_\_\_

**PART 4: EXEMPTION FROM FIRST SOURCE HIRING AGREEMENT PROVISIONS OF THE BOSTON JOBS AND LIVING WAGE ORDINANCE**

Any Beneficiary who qualifies may request an Exemption from the First Source Hiring Agreement provisions of the Boston Jobs And Living Wage Ordinance by completing the following:

I hereby request an exemption from the First Source Hiring Agreement provisions of the Boston Jobs And Living Wage Ordinance for the following reason(s). Attach any pertinent documents to this Application to prove that you are exempt. Please check the appropriate box(es) below.

- The construction contract awarded by the City of Boston is subject to the state prevailing wage law; and
- Assistance awarded to youth programs, provided that the award is for stipends to youth in the program. "Youth Program" means any city, state, or federally funded program which employs youth, as defined by city, state, or federal guidelines, during the summer, or as part of a school to work program, or in other related seasonal or part-time program; and
- Assistance awarded to work-study or cooperative educational programs, provided that the Assistance is for stipends to students in the programs; and
- Assistance awarded to vendors who provide services to the City and are awarded to vendors who provide trainees a stipend or wage as part of a job training program and provides the trainees with additional services, which may include but are not limited to room and board, case management, and job readiness services, and provided further that the trainees do not replace current City funded positions.

Please give a full statement describing in detail the reasons you are exempt from the First Source Hiring Agreement provisions the Boston Jobs And Living Wage Ordinance (attach additional sheets if necessary):

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**PART 5. GENERAL WAIVER REASON(S)**

I hereby request a General Waiver from the First Source Hiring Agreement provisions of the Boston Jobs And Living Wage Ordinance. The application of the First Source Hiring Agreement provisions to my Assistance violates the following state or federal statutory, regulatory or constitutional provision or provisions.

State the specific state or federal statutory, regulatory or constitutional provision or provisions, which makes compliance with the First Source Hiring Agreement provisions unlawful:

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**GENERAL WAIVER ATTACHMENTS:**

Please attach a copy of the conflicting statutory, regulatory or constitutional provisions that makes compliance with this ordinance unlawful.

Please give a full statement describing in detail the reasons the specific state or federal statutory, regulatory or constitutional provision or provisions makes compliance with the First Source Hiring Agreement provisions unlawful (attach additional sheets if necessary):

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**PART 6: BENEFICIARY OF ASSISTANCE AFFIDAVIT:**

I, (print or type) Jon Rudzinski, the Beneficiary, certify and swear/affirm that the information provided on this **Beneficiary Affidavit** is true and within my own personal knowledge and belief.

Signed under the pains and penalties of perjury.

SIGNATURE:  DATE: 02/11/2018

TITLE: Manager

**Conflict of Interest Affidavit Form**

The undersigned hereby certifies, under the pains and penalties of perjury, that neither they, nor those with whom they have business ties, nor any immediate family member of the undersigned, is currently or has been within the past twelve months, an employee, agent, consultant, officer or elected or appointed official of the City of Boston Department of Neighborhood Development. For purposes of this affidavit "immediate family member" shall include parents, spouse, siblings, or children, irrespective of their place of residence.

I declare under penalties of perjury that the foregoing representations are true, correct, accurate, complete and correct in all respects.

WITNESS:

BORROWER:

Ellen D. Rudzinski

Jon Rudzinski

THE COMMONWEALTH OF MASSACHUSETTS

Suffolk, ss.

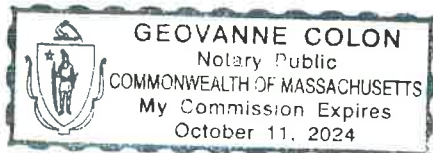
February, \_\_\_\_\_ 2018

Then personally appeared the above named Jon Rudzinski, Manager, (title) of (organization) and executed the foregoing instrument and acknowledged the foregoing instrument to be (his/her) free act and deed as (title) aforesaid and the free act and deed of (organization), before me.

Geovanne Colon

Name: Geovanne Colon  
Notary Public

My Commission Expires: 10/11/2024



**E+ Marcella / Highland: Package 2  
PRE-DEVELOPMENT SOURCES  
PRE-DEVELOPMENT SOURCES  
& USES BUDGET**

Uses of Funds	RFP Submission		Developer Designation		Article 80 Approval		ZBA Hearing		DHCD Application					
	Jan-18	Feb-18	Mar-18	Apr-18	May-18	Jun-18	Jul-18	Aug-18	Sep-18	Oct-18	Nov-18	Dec-18	Jan-19	Feb-19
Acquisition														
Direct Construction			24,000											
Architecture & Engineering			1,000				2,500	2,500	2,500	2,500				
Surveys/Civil														
Clerk of the Works												1,750		
Environmental Engineers														
Utilities & Testing														
Bond Premium														
Inspecting Engineer Bank														
Legal							2,000	2,000	2,000	2,000				
Title & Recording														
Accounting & Cost Cert.														
FF&E														
Real Estate Taxes														
Insurance														
Appraisal / Market Study													3,000	
Construction Loan Interest														
Financing Fees - DHCD														5,250
Permanent Loan Fees														
Construction Loan Fees														
LEED / HERS Consultants														
Marketing & Rent Up														
Soft Cost Contingency														
TOTAL	1,000	0	30,000	0	0	0	4,500	4,500	7,000	4,500	2,000	1,750	8,250	0
<u>Sources of Funds</u>														
Developer Working Capital														
Pre-Development Loan														
Closing Proceeds														
TOTAL	(1,000)	0	(30,000)	0	0	0	(4,500)	(4,500)	(7,000)	(4,500)	(2,000)	(1,750)	(8,250)	0
(Surplus) / Deficit	0	0	0	0	0	0	0	0	0	0	0	0	0	0

**E+ Marcella / Highland: Package 2  
 PRE-DEVELOPMENT SOURCES  
 PRE-DEVELOPMENT SOURCES  
 & USES BUDGET**

Uses of Funds	Mar-19	Apr-19	May-19	Jun-19	Jul-19	Aug-19	Sep-19	Oct-19	Total
Acquisition									0
Direct Construction									0
Architecture & Engineering				2,500					34,000
Surveys/Civil									6,000
Clerk of the Works									0
Environmental Engineers						1,750			3,500
Utilities & Testing									0
Bond Premium									0
Inspecting Engineer Bank									0
Legal									10,000
Title & Recording									0
Accounting & Cost Cert									0
FF&E									0
Real Estate Taxes									0
Insurance									0
Appraisal / Market Study									3,000
Construction Loan Interest									0
Financing Fees - DHCD									5,250
Permanent Loan Fees				2,500					0
Construction Loan Fees				2,500					2,500
LEED / HERS Consultants									8,500
Marketing & Rent Up									0
Soft Cost Contingency									0
TOTAL	0	0	0	7,500	0	1,750	0	0	72,750
<i>Sources of Funds</i>									
Developer Working Capital				(7,500)		(1,750)			(72,750)
Pre-Development Loan									0
Closing Proceeds									0
TOTAL	0	0	0	(7,500)	0	(1,750)	0	0	(72,750)
(Surplus) / Deficit	0	0	0	0	0	0	0	0	0

# Section 1 PROJECT DESCRIPTION

Name and Address of Project			
1 . Project Name:	E+ Marcella / Highland 2		
1a . Application Completed By:	Jon Rudzinski		
1b . Original Application Date:	2/14/18	Application Revision Date:	
2 . Project Address:	93/95-125R & 108-114 Marcella St., Beech Glen St., Thwing St.		
3 . Neighborhood	Roxbury		
4 . City/ Town	Boston	MA	02119
	(state)	(zip code)	
5 . County	SUFFOLK		
6 . <input checked="" type="checkbox"/> Scattered sites	<i>Please include a list of addresses in Exhibit I.</i>		
7 . Is this a qualified census tract?	Yes	Select A QCT	813
8 . Difficult to develop area	No	QCT information last updated on:	12/16/2010

## Development Plan

9 . **Development Type** (Please check all that apply.)

Yes	New construction
No	Acquisition, substantial rehab of existing housing
No	Acquisition, moderate rehab of existing housing
No	Acquisition, minimal or no rehab of existing housing
No	Adaptive re-use of non-residential structure

10 . Proposed Housing Type Rental (except SRO or Assisted Living, see below)

11 . **Project Description:** Number of buildings: 4

The project involves the new construction of four (4) rowhouse-style buildings on vacant, city-owned land under the City of Boston's E+ Green Building Program.

12 . **Development Schedule:**

	Original	Revised	Optional user comments
Application Date	2/14/18		
Construction Loan Closing	9/30/2019		
Initial Loan Closing (MHFA only)			
Construction Start	10/1/2019		
50% Construction Completion	3/1/2020		
Construction Completion	8/31/2012		
First Certificate of Occupancy	9/1/2020		
Final Certificate of Occupancy	9/1/2020		
Sustained Occupancy	1/1/2021		
Permanent Loan Closing	2/1/2021		

E+ Marcella Highland 2

Application Date: 2/14/18

#VALUE!

13 . Unit Mix:

	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 60%	Other Income 100%	Market Rate	Total Units
0 bedroom						0
1 bedroom						0
2 bedrooms						0
2 bedrooms						0
3 bedrooms	1		4	2	5	12
4 bedrooms			1	1		2
<b>Total Units</b>	<b>1</b>	<b>0</b>	<b>5</b>	<b>3</b>	<b>5</b>	<b>14</b>
Home Units*						0

\*HOME units included in the above totals. Other Income=Below 100% of median income

14 . Unit Size in square feet:

	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 60%	Other Income 100%	Market Rate	Average All Incomes
0 bedroom						N/A
1 bedroom						N/A
2 bedrooms						N/A
2 bedrooms						N/A
3 bedrooms	1495.3		1495.3	1495.3	1495.3	1,495
4 bedrooms			1605.0	1605.0		1,605

15 . Number of bathrooms in each unit:

	Low-Income Rental Assisted	Low-Income below 50%	Low-Income below 60%	Other Income 100%	Market Rate	Average All Incomes
0 bedroom						N/A
1 bedroom						N/A
2 bedrooms						N/A
2 bedrooms						N/A
3 bedrooms	2.5		2.5	2.5	2.5	2.5
4 bedrooms			3.0	3.0		3.0

16 . Funding Applied For:

Please check all the funding that is being applied for at this time, with this application:

DHCD Tax Credit Allocation .....  No  
 Category .....  Not Applicable  
 Category .....  Not Applicable

HOME Funding through DHCD .....  No

Massachusetts Housing Finance Agency (select all that apply):  
 Official Action Status .....  No  
 Construction Financing/Bridge Financing.....  No  
 Permanent Financing .....  No

Massachusetts Housing Partnership (MHP) Fund:  
 Permanent Rental Financing Program .....  No

Massachusetts Housing Investment Corporation (select all that apply):  
 Debt Financing .....  No  
 Tax Credit Equity Investment .....  No

Boston Department of Neighborhood Development (DND):  Yes

Other .....  No  
 Other.....  N/A  
 Other.....  N/A  
 Other.....  N/A  
 Financing from MassDevelopment .....  No



17 . Number of buildings planned	Total	New Construction	Rehabilitation
a. Single-Family	0		
b. 2-4 Family	0		
c. Townhouse	4	4	
d. Low/Mid rise	0		
e. High-rise	0		
f. Other	0		
<b>TOTAL</b>	<b>4</b>	<b>4</b>	<b>0</b>

18 . Number of units:

19 . Gross Square Footage			
a. Residential	23,491	23,491	
b. Commercial			

20 . Net Rentable Square Footage:	Total	Percent of Gross
a. Residential	21,154 s.f.	90%
b. Commercial	s.f.	N/A

21 . Number of handicapped accessible units  Percent of total

22 . Fire Code Type

23 . Will building(s) include elevators?

24 . Are the following provided with the housing units:

a. Range? .....	Yes
b. Refrigerator? .....	Yes
c. Microwave? .....	Yes
d. Dishwasher? .....	Yes
e. Disposal? .....	Yes
f. Washer/Dryer Hookup? .....	Yes
g. Washer & Dryer? .....	No
h. Wall-to-wall Carpet? .....	No
i. Window Air Conditioner? ..	No
j. Central Air Conditioning? ..	Yes

Gas or electric

Optional user comments

25 . Are the following included in the rent:

a. Heat? .....	No
b. Domestic Electricity? .....	No
c. Cooking Fuel? .....	No
d. Hot Water? .....	Yes
e. Central A/C, if any? .....	No

26 . Type of heating fuel:

27 . Total no. of parking spaces:  Outdoor:  Enclosed:

28 . Number of parking spaces exclusively for the use of tenants:

a. Residential	Total:	<input type="text" value="11"/>	Outdoor:	<input type="text" value="11"/>	Enclosed:	<input type="text"/>
b. Commercial	Total:	<input type="text" value="0"/>	Outdoor:	<input type="text"/>	Enclosed:	<input type="text"/>

29 . Will rehabilitation require the relocation of existing tenants? Not applicable

30 . Scope of rehabilitation: Please describe the following (or type N/A).

a. Major systems to be replaced:

Not applicable

b. Substandard conditions and structural deficiencies to be repaired:

Not applicable

c. Special features/adaptations for special needs clients to be housed:

Not applicable

31 . Are energy conservation materials in excess of the Building Code?

a. Insulation .....	Yes	R-Value or type?	R-22 / R-40
b. Windows .....	Yes	R-Value or type?	
c. Heating system .....	Yes	R-Value or type?	

**Information On Site And Existing Buildings**

	Square Feet	Acres
32 . Size of Site:	47,013	1.08
33 . Wetlands area:		
34 . Buildable area:	47,013	1.08

**Existing Conditions:**

35 . What is the present use of the property? Vacant land

36 . Number of existing structures: -

37 . Gross s.f. of existing structures:

38 . If rehabilitation:

	number of units	num. of bedrooms
a. Number of existing residential units/bedrooms:		
b. Number of units/bedrooms currently occupied:		

39 . If site includes commercial space:

a. Square footage of existing commercial space:		square feet
b. Square footage currently occupied:		square feet

40 . What are the surrounding land uses? Small- and mid-sized multi-family residential; some low-impact industrial uses

**Utilities:**

41 . Are the following utilities available on the site:

a. Sanitary sewer?	Yes
b. Storm sewer?	Yes
c. Public water?	Yes
d. Electricity?	Yes
e. Gas?	Yes

If any of the above are not available, is plan attached explaining how such service will be extended to the site? N/A

**Zoning:**

Please include information on the property zoning in Exhibit 3. This should include a zoning map, highlighting any special use or dimensional restrictions on the property. If the present zoning does not allow for the proposed use, please explain current status and how approvals will be obtained.

42 . Does the present zoning allow the proposed development?  Yes  No

43 . Have you applied for a zoning variance, change, special permit or subdivision?  Yes  No

44 . Do you anticipate applying for a comprehensive permit under Chapter 77A?  Yes  No

**Site Control:**

45 . What form of site control do you have?

Include copies of the appropriate site control documents as part of Exhibit 4.

46 . Please provide details about your site control agreement.

a. Name of Seller:	City of Boston
b. Principals of seller corporation:	
c. Type of Agreement:	
d. Agreement Date:	
e. Expiration Date:	
f. Purchase price if under agreement:	
g. Is there any identity of interest between buyer and seller?	<input type="text" value="No"/>

47 . In the past three years, have there been any defaults on any mortgage on the property or any other forms of financial distress?

48 . Are there any outstanding liens on the property?

**Amenities and Services:**

49 . Please indicate distance from site and locate on city/town map (Exhibit 1).

	Distance	
a. Shopping facilities .....	0.30	miles
b. Schools .....	0.25	miles
c. Hospitals .....	0.75	miles
d. Parks and recreational facilities .....	0.15	miles
e. Police station .....	0.80	miles
f. Fire station .....	0.80	miles
g. Public transportation .....	0.20	miles
h. Houses of worship .....	0.50	miles
i. City/Town Hall .....	4.00	miles

## Environmental Information

- 50 . Is there any evidence of underground storage tanks or releases of oil or hazardous materials, including hazardous wastes, on the site or within close proximity to the site?
- 51 . Has a Chapter 21E assessment been performed?  
*Please include a copy as Exhibit 2*
- 52 . Does the project consist of either: (a) new construction of more than 100 units; or (b) substantial rehabilitation of more than 200 units, or where more than 10% new floor space is added?
- 53 . Does the building require lead paint abatement?
- 54 . Does the building require asbestos abatement?
- 55 . Do radon tests show radon levels exceeding four picocuries/liter?
- 56 . Is there any evidence that the premises are insulated with urea formaldehyde foam (UFFI)?
- 57 . Is the site located in an historic district, or contain buildings listed or eligible for listing in the State Register of Historic Places?
- 58 . Are there any above ground storage containers with flammable or explosive petroleum products or chemicals within 1/2 mile of the site?
- 59 . Is the site located in a floodplain or wetlands area?
- 60 . Does the site contain endangered animal or plant species?
- 61 . Is the site subject to noise impact from jet airports within five miles, major highways within 1,000 feet, or rail traffic within 3,000 feet?

## Section 2 DEVELOPMENT TEAM SUMMARY

**62 . Developer/Sponsor Type**

Other for-profit corporations/partnerships/individuals

**63 . Developer/Sponsor:**

Form of Legal Entity

Limited Liability Company

Legal Name

Rees-Larkin Development LLC

Address

179 Boylston Street, Building P

Jamaica Plain, MA 02130

Contact Person

Jon Rudzinski

617-838-9388

E-mail

jon@rees-larkindevelopment.com

**64 . Owner/Mortgagor:**

Legal Name

M-H Redevelopment LLC

Address

179 Boylston Street, Building P

Jamaica Plain, MA 02130

Has this entity already been formed?

No

Soc. Sec. or Tax ID #

Principals

Rees-Larkin Development LLC

Principals

Jon Rudzinski

Contact Person

617-838-9388

Telephone No. / Fax. No.

E-mail

jon@rees-larkindevelopment.com

**65 . General Partner:**

Legal Name

Rees-Larkin Development LLC

Address

179 Boylston Street, Building P

Jamaica Plain, MA 02130

Has this entity already been formed?

Yes

Soc. Sec. or Tax ID # 26-3611042

Principal (if corporate)

Jon Rudzinski

Contact Person

Jon Rudzinski

% of Ownership

100.00%

Telephone No. / Fax. No.

617-838-9388

E-mail

jon@rees-larkindevelopment.com

**66 . General Partner:**

Legal Name

Address

Has this entity already been formed?

Principal (if corporate)

Contact Person

% of Ownership

Telephone No. / Fax. No.

E-mail

**67 . Development Consultant:**

Legal Name  
 Address  
  
 Contact Person  
 Telephone No. / Fax. No.  
 E-mail


**68 . Contractor:**

Name  
 Address  
  
 Fed Tax ID #  
 Contact Person  
 Telephone No. / Fax. No.  
 E-mail

Consigli
266 Summer Street
Boston, MA 02210
Christopher Scarvalas
617-502-1831
cscarvalas@consigli.com

**69 . Architect:**

Name  
 Address  
  
 Contact Person  
 Telephone No. / Fax. No.  
 E-mail

Studio G Architects
179 Boylston Street, Building P
Jamaica Plain, MA 02130
Gail Sullivan
617-524-5558
galls@studiogarchitects.com

**70 . Management Agent:**

Name  
 Address  
  
 Contact Person  
 Telephone No. / Fax. No.  
 E-mail


**71 . Attorney (Real Estate):**

Name  
 Address  
  
 Contact Person  
 Telephone No. / Fax. No.  
 E-mail

Murtha Cullina LLP
99 High Street
Boston, MA 02110
Deirdre Robinson
617-457-4052
drobenson@murthalaw.com

**72 . Attorney (Tax):**

Name  
 Address  
  
 Contact Person  
 Telephone No. / Fax. No.  
 E-mail

Murtha Cullina LLP
99 High Street
Boston, MA 02110
Deirdre Robinson
617-457-4052
drobenson@murthalaw.com

**73 . Syndicator:**

Name  
 Address  
  
 Contact Person  
 Telephone No. / Fax. No.  
 E-mail

MHEF
70 Federal Street, 6th Floor
Boston, MA 02110
Bruce Ehrlich
617-850-1040
ehrich@mhc.com

74 . Guarantor:

Name  
Address  
  
Contact Person  
Telephone No. / Fax. No.  
E-mail

Jon Rudzinski
179 Boylston Street, Building P
Jamaica Plain, MA 02130
Jon Rudzinski
617-838-9388
jon@rees-larkindevelopment.com

75 . Service Provider or Coordinator:

Name  
Address  
  
Contact Person  
Telephone No. / Fax. No.  
E-mail


76 . Marketing Agent:

Name  
Address  
  
Contact Person  
Telephone No. / Fax. No.  
E-mail


77 .

Other role

Name  
Address  
  
Contact Person  
Telephone No. / Fax. No.  
E-mail


78 .

Other role

Name  
Address  
  
Contact Person  
Telephone No. / Fax. No.  
E-mail


79 . Is there any identity of interest between any members of the development team?

Rees-Larkin Development LLC will serve as the Developer/Sponsor and as the managing member of M-H Redevelopment LLC, the Owner/Mortgagor.

80 . Please describe the relationship of the development entity to sponsoring organizations. Is the entity newly-formed or to-be-formed? Is it a single-purpose corporation? How will the parent corporation provide support to this entity? Include an organizational chart showing other affiliates of the parent corporation, as appropriate, and principals of each.

Rees-Larkin Development LLC, the project sponsor and developer, is an existing entity. M-H Redevelopment LLC, the owner-mortgagor is to-be-formed.





**Uses of Funds**

The Contractor certifies that, to the best of their knowledge, the construction estimates, and trade-item breakdown on this page are complete and accurate

**Direct Construction:**

105 . Who prepared the estimates? **Jared Lachapelle, Consigli Constru**  
Name Signature

106 . Basis for estimates? **Conceptual Plans & Specifications; HERS Modeling**

	DV	Trade Item	Amount	Description
107 .	3	Concrete	\$537,303	
108 .	4	Masonry		
109 .	5	Metals	\$101,750	
110 .	6	Rough Carpentry	\$809,849	
111 .	6	Finish Carpentry	\$304,368	
112 .	7	Waterproofing		
113 .	7	Insulation	\$203,890	
114 .	7	Roofing	\$285,112	
115 .	7	Sheet Metal and Flashing		
116 .	7	Exterior Siding	\$1,758,357	
117 .	8	Doors	\$132,654	
118 .	8	Windows	\$294,944	
119 .	8	Glass		
120 .	9	Lath & Plaster		
121 .	9	Drywall	\$514,629	
122 .	9	Tile Work	\$85,955	
123 .	9	Acoustical		
124 .	9	Wood Flooring	\$164,607	
125 .	9	Resilient Flooring	\$3,371	
126 .	9	Carpet		
127 .	9	Paint & Decorating	\$133,396	
128 .	10	Specialties	\$24,579	
129 .	11	Special Equipment		
130 .	11	Cabinets	\$121,034	
131 .	11	Appliances	\$72,331	
132 .	12	Blinds & Shades		
133 .	13	Modular/Manufactured		
134 .	13	Special Construction		
135 .	14	Elevators or Conveying Syst.		
136 .	15	Plumbing & Hot Water	\$568,820	
137 .	15	Heat & Ventilation	\$441,011	
138 .	15	Air Conditioning		
139 .	15	Fire Protection	\$106,250	
140 .	16	Electrical	\$383,989	
141 .		Accessory Buildings		
142 .		Other/misc	\$266,669	PV
143 .		<b>Subtotal Structural</b>	<b>\$7,314,869</b>	
144 .	2	Earth Work	\$537,329	
145 .	2	Site Utilities		
146 .	2	Roads & Walks		
147 .	2	Site Improvement	\$352,119	
148 .	2	Lawns & Planting		
149 .	2	Geotechnical Conditions		
150 .	2	Environmental Remediation		
151 .	2	Demolition		
152 .	2	Unusual Site Cond		
153 .		<b>Subtotal Site Work</b>	<b>\$889,448</b>	
154 .		<b>Total Improvements</b>	<b>\$8,204,317</b>	
155 .	1	General Conditions	\$697,118	
156 .		<b>Subtotal</b>	<b>\$8,901,435</b>	
157 .	1	Builders Overhead	\$415,758	
158 .	1	Builders Profit	\$290,063	
159 .		<b>TOTAL</b>	<b>\$9,607,256</b>	

160 Total Cost/square foot: **\$408.98** Residential Cost/s.f.: **\$408.98**

**Development Budget:**

	Total	Residential	Commercial	Comments
161 . Acquisition: Land	\$1,011,000	\$1,011,000		
162 . Acquisition: Building	\$0			
163 . Acquisition Subtotal	\$1,011,000	\$1,011,000	\$0	
164 . Direct Construction Budget	\$9,607,256	\$9,607,256		(from line 159)
165 . Construction Contingency	\$485,000	\$485,000		5.0% of construction
166 . Subtotal: Construction	\$10,092,256	\$10,092,256	\$0	

**General Development Costs:**

167 . Architecture & Engineering	\$500,000	\$500,000		
168 . Survey and Permits	\$37,500	\$37,500		includes Utilities & Testing
169 . Clerk of the Works	\$23,000	\$23,000		
170 . Environmental Engineer	\$20,000	\$20,000		
171 . Bond Premium	\$59,790	\$59,790		
172 . Legal	\$130,000	\$130,000		
173 . Title and Recording	\$15,000	\$15,000		
174 . Accounting & Cost Cert.	\$11,000	\$11,000		
175 . Marketing and Rent Up	\$40,000	\$40,000		
176 . Real Estate Taxes	\$26,000	\$26,000		
177 . Insurance	\$62,000	\$62,000		
178 . Relocation	\$0	\$0		
179 . Appraisal	\$8,000	\$8,000		
180 . Security	\$0	\$0		
181 . Construction Loan Interest	\$180,000	\$180,000		
182 . Inspecting Engineer	\$9,000	\$9,000		
183 . Fees to: DHCD	\$58,168	\$58,168		
184 . Fees to:	\$0			
185 . MIP	\$0			
186 . Credit Enhancement Fees	\$8,000	\$8,000		State TC Loan Fee
187 . Letter of Credit Fees	\$0			
188 . Other Financing Fees	\$59,000	\$59,000		Construction / Perm Loan Fee(s)
189 . Development Consultant	\$16,000	\$16,000		Energy Consultant
190 . Other: FF&E	\$6,000	\$6,000		
191 . Other:	\$0			
192 . Soft Cost Contingency	\$20,000	\$20,000		1.6% of soft costs
193 . Subtotal: Gen. Dev.	\$1,288,458	\$1,288,458	\$0	

194 . Subtotal: Acquis., Const and Gen. Dev.	\$12,391,714	\$12,391,714	\$0
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195 . Capitalized Reserves	\$162,000	\$162,000	
196 . Developer Overhead	\$150,000	\$150,000	
197 . Developer Fee	\$750,000	\$750,000	

198 . Total Development Cost	\$13,453,714	\$13,453,714	\$0	TDC per unit	\$960,980
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199 . TDC, Net	\$13,249,542	\$13,249,542	\$0	TDC, Net per unit	\$946,396
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**Additional Detail on Development Pro-Forma:**

200 .	Gross Syndication Investment	
<b>Off-Budget Costs:</b>		
<b>Syndication Costs:</b>		
201 .	Syndication Legal	
202 .	Syndication Fees	
203 .	Syndication Consultants	
204 .	Bridge Financing Costs	
205 .	Investor Servicing (capitalized)	
206 .	Other Syndication Expenses	
207 .	Total Syndication Expense	\$0
208 .	Current Reserve Balance	
<b>Reserves (capitalized):</b>		
209 .	Development Reserves	
210 .	Initial Rent-Up Reserves	
211 .	Operating Reserves	\$162,000
212 .	Net Worth Account	
213 .	Other Capitalized Reserves	
214 .	Subtotal: Capitalized Reserves	\$162,000
215 .	Letter of Credit Requirements	
216 .	Total of the Above	\$162,000

**Check: Line 214 is the same as line 195.**

Please Answer The Following	Dev Reserves	Initial Rent-Up	Op. Reserves	Net Worth	Other	Letter of Credit
Who requires the reserves?			Syndicator			
Who administers the reserves?			Syndicator			
When and how are they used?			Oper. Deficits			
Under what circumstances can they be released?			End of LIHTC Comp. Period			

**Unit Sales (For Sale Projects Only):**

217 .	Gross Sales From Units	\$
218 .	Cost of Sales (Commissions, etc.)	\$
219 .	Net Receipt from Sales	\$0

**Debt Service Requirements:**

220 .	Minimum Debt Service Coverage	1.15
221 .	Is this Project subject to HUD Subsidy Layering Review?	No

*Optional user comments:*

## Section 4 OPERATING PRO-FORMA

Operating Income				
Rent Schedule:	Contract Rent	Utility Allowance	Total Gross Rent	No. of Units
222 . Low-Income (Rental Assisted):				
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
2 bedrooms			\$0	0
3 bedrooms	\$710	\$90	\$800	1
4 bedrooms			\$0	0
223 . Low-Income (below 50%):				
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
2 bedrooms			\$0	0
3 bedrooms			\$0	0
4 bedrooms			\$0	0
224 . Low-Income (below 60%):				
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
2 bedrooms			\$0	0
3 bedrooms	\$1,500	\$90	\$1,590	4
4 bedrooms	\$1,675	\$110	\$1,785	1
225 . Other Income 100%	Below 100% of the median income for the region			
0 bedroom			\$0	0
1 bedroom			\$0	0
2 bedrooms			\$0	0
2 bedrooms			\$0	0
3 bedrooms	\$2,575	\$90	\$2,665	2
4 bedrooms	\$2,875	\$110	\$2,985	1
226 . Market Rate (unrestricted occupancy):				
0 bedroom				0
1 bedroom				0
2 bedrooms				0
2 bedrooms				0
3 bedrooms	\$3,100			5
4 bedrooms				0
<b>Commercial Income:</b>				
227 . Square Feet:	0	@	(average) _____ /square foot =	\$0
<b>Parking Income:</b>				
228 . Spaces:	14	@	(average) _____ /month x 12 =	\$0



Operating Expenses				
Annual Operating Exp.:	Total	Residential	Commercial	Comments
250 . Management Fee	\$18,189	\$18,189		
251 . Payroll, Administrative	\$11,000	\$11,000		
252 . Payroll Taxes & Benefits, Admin.	\$1,000	\$1,000		
253 . Legal	\$500	\$500		
254 . Audit	\$5,500	\$5,500		
255 . Marketing	\$2,600	\$2,600		
256 . Telephone	\$1,000	\$1,000		
257 . Office Supplies	\$500	\$500		
258 . Accounting & Data Processing	\$0			
259 . Investor Servicing	\$0			
260 . DHCD Monitoring Fee	\$500	\$500		
261 . Other: Misc.	\$500	\$500		
262 . Other: Training	\$0			
263 . <b>Subtotal: Administrative</b>	\$23,100	\$23,100	\$0	
264 . Payroll, Maintenance	\$8,750	\$8,750		
265 . Payroll Taxes & Benefits, Admin.	\$0			
266 . Janitorial Materials	\$0			
267 . Landscaping	\$3,000	\$3,000		
268 . Decorating (inter. only)	\$2,700	\$2,700		
269 . Repairs (inter. & ext.)	\$2,000	\$2,000		
270 . Elevator Maintenance	\$0			
271 . Trash Removal	\$0			
272 . Snow Removal	\$2,000	\$2,000		
273 . Extermination	\$1,050	\$1,050		
274 . Recreation	\$0			
275 . Other: Misc.	\$500	\$500		
276 . <b>Subtotal: Maintenance</b>	\$20,000	\$20,000	\$0	
277 . <b>Resident Services</b>	\$0			
278 . <b>Security</b>	\$0			
279 . Electricity	\$8,000	\$8,000		
280 . Natural Gas	\$0			
281 . Oil	\$0			
282 . Water & Sewer	\$8,000	\$8,000		
283 . <b>Subtotal: Utilities</b>	\$16,000	\$16,000	\$0	
284 . <b>Replacement Reserve</b>	\$7,000	\$7,000		
285 . <b>Operating Reserve</b>	\$0			
286 . Real Estate Taxes	\$42,000	\$42,000		
287 . Other Taxes	\$0			
288 . Insurance	\$11,000	\$11,000		
289 . MIP	\$0	\$0		
290 . Other:	\$0			
291 . <b>Subtotal: Taxes, Insurance</b>	\$53,000	\$53,000	\$0	
292 . <b>TOTAL EXPENSES</b>	\$137,289	\$137,289	\$0	

**Other Operating Expense Assumptions**

**Trending Assumptions for Expenses**

	Year 2	Year 3	Years 4-5	Years 6-20
293 Sewer & Water .....	3.0%	3.0%	3.0%	3.0%
294 Real Estate Taxes .....	2.0%	2.0%	2.0%	2.0%
295 All Other Operating Expenses .....	3.0%	3.0%	3.0%	2.9%

**Reserve Requirements:**

296 Replacement Reserve Requirement	\$500.00	per unit per year
297 Operating Reserve Requirement		per unit per year

**Debt Service:**

		Annual Payment
298 MHFA	MHFA Program 1	N/A
299 MHFA	MHFA Program 2	N/A
300	MHP Fund Permanent Loan	N/A
301	Other Permanent Senior Mortgage	\$192,167
	Source: N/A	
302	Other Permanent Senior Mortgage	N/A
	Source: N/A	
303	<b>Total Debt Service (Annual)</b>	<b>\$192,167</b>
304	<b>Net Operating Income</b>	<b>\$227,185</b> (in year one)
305	<b>Debt Service Coverage</b>	<b>1.18</b> (in year one)

**Affordability: Income Limits and Maximum Allowable Rents**

306 County  MSA

This MSA does not match the county you have chosen

307 Maximum Allowed Rents, by Income, by Unit Size:

Income Limits last updated on

	Maximum Income			Maximum Rent (calculated from HUD income data)		
	50%	60%	100%	50%	60%	100%
0 bedroom	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
1 bedroom	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
2 bedrooms	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
2 bedrooms	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
3 bedrooms	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
4 bedrooms	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!	#VALUE!
Area median income for a family of	#VALUE!					

308 H.U.D. "Fair Market Rents" (Maximum):

0 bedroom	#VALUE!
1 bedroom	#VALUE!
2 bedrooms	#VALUE!
3 bedrooms	#VALUE!
4 bedrooms	#VALUE!
5 bedrooms	#VALUE!

FMR Information last updated on

Operations before this transaction:				Operations after:			
Type	Number	Current Rent	Annualized Income	Number	Future Rents	Market Rent GPR	
309 . 0 bedroom	0	0	0	0			0
310 . 1 bedroom	0	0	0	0			0
311 . 2 bedrooms	0	0	0	0			0
312 . 2 bedrooms	0	0	0	0			0
313 . 3 bedrooms	12	0	0	12			0
314 . 4 bedrooms	2	0	0	2	0		0
315 . Gross Potential Rental Income			0				0
316 . Vacancy		0%	0	Vacancy	5%		-19,146
317 . Other Income			0	Other Income			700
318 . Effective Gross Income			0	Effective Gross Income			-18,446
<b>Operating Expenses</b>				<b>Year</b>	<b>Reason</b>	<b>% Change</b>	<b>Year</b>
319 . Management fee			0				18,189
320 . Administration			0				23,100
321 . Maintance/Operations			0				20,000
322 . Resident Services			0				0
323 . Security			0				0
324 . Utilities			0				16,000
325 . Replacement Reserve			0				7,000
326 . Operating Reserve			0				0
327 . Real Esate Taxes			0				42,000
328 . Insurance			0				11,000
329 . Total Expenses			0				137,289
330 . Net Operating Income			0	Net Operating Income			-155,735

331 . Transaction Description:

Optional user calculations




## Section 5 LOW INCOME HOUSING TAX CREDITS

### Percent of Project Which Qualifies for Tax Credit

332 . Low-Income Units .....	6		Total Units:	14
333 . Percent of Units .....	42.9%			
334 . Low-Income Square Feet .....	9,082	s.f.	Total Area:	21,154
335 . Percent of Area .....	42.9%			s.f.
336 . Applicable Percentage .....	42.9%	(This is the lower of lines 333 and 335 above.)		
337 . Is the project utilizing tax-exempt financing?	No			
338 . Does the project qualify for an acquisition credit?	Yes			
339 . Does the rehabilitation qualify for a 9% rather than 4% credit?	Yes			
340 . How much financing is nonqualified (federally subsidized?)	\$750,000			
341 . What grant funds must be subtracted from acquisition basis?	\$			
342 . What grant funds must be subtracted from rehabilitation basis?	\$			
343 . Will the project have a minimum of 20% of units for households earning less than 50% of median, or 40% for less than 60% of median?	40% Of Units			

### Historic Tax Credit:

344 . Does the project qualify for historic tax credits?	Yes
345 . What are the rehabilitation costs which are not qualified for historic credits?	\$11,788,946

### Project Qualification for 130%:

346 . Is the project located in a "qualified census tract" or in a "difficult to develop" area?	Yes
---	-----

### Calculation of Maximum Tax Credit Amount

	Acquisition Credit			Rehabilitation Credit
347 . Total Eligible Development Costs	\$0			\$11,788,946
348 . Less: Portion of Grants Allocated to Basis	\$0			\$0
349 . Less: 20% Historic Rehab Credit Basis Reduction	\$0			(\$0)
350 . Less: Nonqualified source of financing	\$0			\$600,000
351 . Subtotal: Eligible Basis	\$0			\$11,188,946
352 . "Hard to develop" area	100%			130%
353 . Percent Low-Income	42.9%			42.9%
354 . Applicable Rate	3.24%			9.00%
355 . Maximum Annual Tax Credit Amount	\$0			\$561,607
356 . Total Annual Tax Credit Amount			\$561,607	
357 . Estimated Net LIHTC Syndication Yield	\$ 0.90	rate per \$	\$5,047,160	
358 . Est. Net Historic Tax Credit Syndication Yield		rate per \$	\$0	
359 . Total Estimated Net Tax Credit Syndication Yield (based on above)			\$5,047,160	
360 . Applicant's Estimate of Net Tax Credit Equity.			\$5,047,200	(from line 82)

*[Note: This page represents a rough estimate of low income credits for which this project may be eligible. It does not represent a final determination.]*

	Total Residential	Percentage of Costs Not in Depreciable Basis	Acquisition Credit Basis	Rehabilitation Credit Basis	Not In Basis
361 . Acquisition: Land	\$1,011,000				\$1,011,000
362 . Acquisition: Building	\$0		\$0		\$0
363 . Acquisition Subtotal	\$1,011,000		\$0	\$0	\$1,011,000
364 . Direct Construction Budget	\$9,607,256		\$0	\$9,607,256	
365 . Construction Contingency	\$485,000		\$0	\$485,000	
366 . Subtotal: Construction	\$10,092,256		\$0	\$10,092,256	\$0
<b>General Development Costs:</b>					
367 . Architecture & Engineering	\$500,000	0%		\$500,000	\$0
368 . Survey and Permits	\$37,500	0%		\$37,500	\$0
369 . Clerk of the Works	\$23,000	0%		\$23,000	\$0
370 . Environmental Engineer	\$20,000	0%		\$20,000	\$0
371 . Bond Premium	\$59,790	0%		\$59,790	\$0
372 . Legal*	\$130,000	48%	\$0	\$68,000	\$62,000
373 . Title and Recording	\$15,000	100%	\$0	\$0	\$15,000
374 . Accounting & Cost Certificat.	\$11,000	10%	\$0	\$9,900	\$1,100
375 . Marketing and Rent Up*	\$40,000	100%			\$40,000
376 . Real Estate Taxes*	\$26,000	50%	\$0	\$13,000	\$13,000
377 . Insurance	\$62,000	0%	\$0	\$62,000	\$0
378 . Relocation	\$0	0%	\$0	\$0	\$0
379 . Appraisal	\$8,000	6%	\$0	\$7,500	\$500
380 . Security	\$0	0%	\$0	\$0	\$0
381 . Construction Loan Interest*	\$180,000	30%	\$0	\$126,000	\$54,000
382 . Inspecting Engineer	\$9,000	0%	\$0	\$9,000	\$0
383 . Financing Fees* DHCD	\$58,168	100%	\$0	\$0	\$58,168
384 . Financing Fees* 0	\$0	100%	\$0	\$0	\$0
385 . MIP	\$0	100%	\$0	\$0	\$0
386 . Credit Enhancement Fees	\$8,000	100%	\$0	\$0	\$8,000
387 . Letter of Credit Fees*	\$0	100%	\$0	\$0	\$0
388 . Other Financing Fees*	\$59,000	64%	\$0	\$21,000	\$38,000
389 . Development Consultant	\$16,000	0%	\$0	\$16,000	\$0
390 . Other* FF&E	\$6,000	0%	\$0	\$6,000	\$0
391 . Other* 0	\$0	0%	\$0	\$0	\$0
392 . Soft Cost Contingency*	\$20,000	10%	\$0	\$18,000	\$2,000
393 . Subtotal: Gen. Dev.	\$1,288,458		\$0	\$996,690	\$291,768
394 . Subtotal: Acquis., Const., and Gen. Dev.	\$12,391,714		\$0	\$11,088,946	\$1,302,768
395 . Developer Overhead	\$150,000		\$0	\$150,000	\$0
396 . Developer Fee/Profit	\$750,000		\$0	\$550,000	\$200,000
397 . Capitalized Reserves	\$162,000		\$0	\$0	\$162,000
398 . Total Development Cost	\$13,453,714				
399 . Total Net Development Cost	\$13,249,542				
400 . Total Eligible Tax Credit Basis	\$11,788,946		\$0	\$11,788,946	

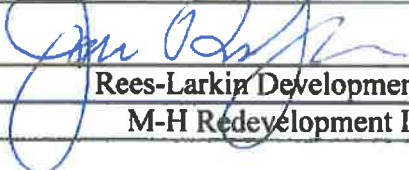
\* Some or all of these costs will typically be allocated to intangible assets or expensed.

# Section 7 SIGNATURE PAGE

Project Name E+ Marcella / Highland 2

Date: February | 14 | 2018  
*(month) (day) (year)*

*The applicant certifies that this application is complete and accurate, to the best of his/her knowledge, and that there are no material misrepresentations.*

Mortgagor:   
Rees-Larkin Development LLC  
M-H Redevelopment LLC

# Project Summary Information

NOTE: Do not fill out this section. It is automatically filled in by program.

Project Name	E+ Marcella / Highland 2
Developer	Rees-Larkin Development LLC
Community	Boston

Number of Units 14

0 bedroom	0	Low-Income, Rental Assisted	1
1 bedroom	0	Low-Income, Below 50%	0
2 bedrooms	0	Low-Income, Below 60%	5
2 bedrooms	0	Other Income 100%	3
3 bedrooms	12	Market Rate	5
4 bedrooms	2		

This is an application for:	DHCD Tax Credit Allocation .....	No
	HOME Funding through DHCD .....	No
	MHFA Official Action Status.....	No
	MHFA Construction Financing.....	No
	MHFA Permanent Financing .....	No
	MHP Fund Financing .....	No
	MHIC Construction Loan.....	No
	MHIC Tax Credit Equity .....	No
	Boston: DND.....	Yes
	Other.....	N/A
	Other.....	N/A
	Other.....	N/A
	Financing from Massdevelopment.....	No

**Sources of Funds:**

Developer's Equity .....	\$1,372,172
Tax Credit Equity .....	\$5,047,200
Public Equity .....	\$559,342
Subordinate Debt .....	\$3,575,000
Permanent Debt .....	\$2,900,000
<b>Total All Sources .....</b>	<b>\$13,453,714</b>

**Uses of Funds:**

Acquisition .....	\$1,011,000
Construction .....	\$10,092,256
General Development .....	\$1,288,458
Developer Overhead .....	\$150,000
Developer Fee .....	\$750,000
Capitalized Reserves.....	\$162,000
<b>Total All Uses .....</b>	<b>\$13,453,714</b>

Uses Exceed Sources by (\$0)

**Rent Levels:**

Low-Income, Rental Assisted .....	\$710
Low-Income, Below 50% .....	N/A
Low-Income, Below 60% .....	\$1,535
Other Income 100%.....	\$2,675
Market Rate .....	\$3,100
<i>Average, All Units .....</i>	<i>\$2,279</i>

**BR (aver.)**

3.0
N/A
3.2
3.3
3.0
3.1

**SF (aver.)**

1495
N/A
1517
1532
1495
1511

**Annual Operating Income (year 1):**

Gross rental income (residential)	\$382,920
Vacancy (resid.) <span style="float: right; border: 1px solid black; padding: 2px;">5.00%</span>	\$19,146
Other Income (net of vacancies)	\$700
<b>Subtotal</b>	<b>\$364,474</b>
Operating Subsidies	\$0
Draw on Operating Reserves	\$0
<b>Total Annual Income</b>	<b>\$364,474</b>
Net Operating Income	\$227,185
Debt Service	\$192,167
Debt Service Coverage	1.18

**Annual Operating Expense (year 1):**

Management Fee	\$18,189
Administrative	\$23,100
Maintenance	\$20,000
Res. Service, Security	\$0
Utilities	\$16,000
Repl. Reserve	\$7,000
Oper. Reserve	\$0
Taxes, Insurance	\$53,000
<b>Total</b>	<b>\$137,289</b>
<b>Total per Unit</b>	<b>\$9,806</b>

# Rent Profile Analysis

**NOTE: Do not fill out this section. It is automatically filled in by program.**

	Units	Contract Rent	Size of Unit	No. of Bathrooms	Gross Rent/ Maximum	Rent per square foot
<b>Low-Income (Rental Assisted):</b>						
0 bedroom	0	N/A	N/A	N/A	#VALUE!	N/A
1 bedroom	0	N/A	N/A	N/A	#VALUE!	N/A
2 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A
2 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A
3 bedrooms	1	\$710	1,495	2.5	#VALUE!	\$0.47
4 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A

<b>Low-Income (below 50%):</b>						
0 bedroom	0	N/A	N/A	N/A	#VALUE!	N/A
1 bedroom	0	N/A	N/A	N/A	#VALUE!	N/A
2 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A
2 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A
3 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A
4 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A

<b>Low-Income (below 60%):</b>						
0 bedroom	0	N/A	N/A	N/A	#VALUE!	N/A
1 bedroom	0	N/A	N/A	N/A	#VALUE!	N/A
2 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A
2 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A
3 bedrooms	4	\$1,500	1,495	2.5	#VALUE!	\$1.00
4 bedrooms	1	\$1,675	1,605	3	#VALUE!	\$1.04

	Below 100% of the median income for the region					
<b>Other Income 100%</b>						
0 bedroom	0	N/A	N/A	N/A	#VALUE!	N/A
1 bedroom	0	N/A	N/A	N/A	#VALUE!	N/A
2 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A
2 bedrooms	0	N/A	N/A	N/A	#VALUE!	N/A
3 bedrooms	2	\$2,575	1,495	2.5	#VALUE!	\$1.72
4 bedrooms	1	\$2,875	1,605	3	#VALUE!	\$1.79

<b>Market Rate (unrestricted occupancy):</b>						
0 bedroom	0	N/A	N/A	N/A		N/A
1 bedroom	0	N/A	N/A	N/A		N/A
2 bedrooms	0	N/A	N/A	N/A		N/A
2 bedrooms	0	N/A	N/A	N/A		N/A
3 bedrooms	5	\$3,100	1,495	2.5		\$2.07
4 bedrooms	0	N/A	N/A	N/A		N/A

# 21-Year Operating Proforma (Years 1-5)

**NOTE: Do not fill out this section. It is automatically filled in by program.**

Calendar Year:	Year 1 2021	Year 2 2022	Year 3 2023	Year 4 2024	Year 5 2025
<b>INCOME:</b>					
Low-Income, Rental Assisted	\$8,520	\$8,690	\$8,864	\$9,041	\$9,222
Low-Income, Below 50%	0	0	0	0	0
Low-Income, Below 60%	92,100	93,942	95,821	97,737	99,692
Other Income 100%	96,300	98,226	100,191	102,194	104,238
Market Rate	186,000	189,720	193,514	197,385	201,332
<i>Gross Potential Income</i>	<i>382,920</i>	<i>390,578</i>	<i>398,390</i>	<i>406,358</i>	<i>414,485</i>
Less vacancy	19,146	19,529	19,919	20,318	20,724
<i>Effective Gross Residential Income</i>	<i>363,774</i>	<i>371,049</i>	<i>378,470</i>	<i>386,040</i>	<i>393,761</i>
Commercial (includes parking)	0	0	0	0	0
Less vacancy	0	0	0	0	0
Net Commercial Income	0	0	0	0	0
<i>Effective Rental Income</i>	<i>363,774</i>	<i>371,049</i>	<i>378,470</i>	<i>386,040</i>	<i>393,761</i>
Other Income: Laundry	0	0	0	0	0
Other Income: Deposits/Fees	700	714	728	743	758
Other Income: 0	0	0	0	0	0
Other Income: 0	0	0	0	0	0
Other Income: 0	0	0	0	0	0
Other Income: 0	0	0	0	0	0
Other Income: 0	0	0	0	0	0
<i>Total Gross Income</i>	<i>364,474</i>	<i>371,763</i>	<i>379,199</i>	<i>386,783</i>	<i>394,518</i>
Operating Subsidies	0	0	0	0	0
Draw on Operating Reserves	0	0	0	0	0
<i>Total Effective Income</i>	<i>\$364,474</i>	<i>\$371,763</i>	<i>\$379,199</i>	<i>\$386,783</i>	<i>\$394,518</i>
<b>EXPENSES:</b>					
Management Fee	18,189	18,553	18,924	19,302	19,688
Administrative	23,100	23,793	24,507	25,242	25,999
Maintenance	20,000	20,600	21,218	21,855	22,510
Resident Services	0	0	0	0	0
Security	0	0	0	0	0
Electrical	8,000	8,240	8,487	8,742	9,004
Natural Gas	0	0	0	0	0
Oil (heat)	0	0	0	0	0
Water & Sewer	8,000	8,240	8,487	8,742	9,004
Replacement Reserve	7,000	7,210	7,426	7,649	7,879
Operating Reserve	0	0	0	0	0
Real Estate Taxes	42,000	42,840	43,697	44,571	45,462
Other Taxes	0	0	0	0	0
Insurance	11,000	11,330	11,670	12,020	12,381
MIP	0	0	0	0	0
Other:	0	0	0	0	0
<i>Total Operating Expenses</i>	<i>\$137,289</i>	<i>\$140,806</i>	<i>\$144,416</i>	<i>\$148,122</i>	<i>\$151,927</i>
<b>NET OPERATING INCOME</b>	<b>\$227,185</b>	<b>\$230,958</b>	<b>\$234,783</b>	<b>\$238,660</b>	<b>\$242,591</b>
Debt Service	\$192,167	\$192,167	\$192,167	\$192,167	\$192,167
Debt Service Coverage	1.18	1.20	1.22	1.24	1.26
Project Cash Flow	\$35,018	\$38,791	\$42,616	\$46,494	\$50,424
Required Debt Coverage	\$220,992	\$220,992	\$220,992	\$220,992	\$220,992
(Gap)/Surplus for Cov.	\$6,193	\$9,966	\$13,791	\$17,669	\$21,599

# 21-Year Operating Proforma (Years 6-10)

**NOTE: Do not fill out this section. It is automatically filled in by program.**

Calendar Year:	Year 6 2026	Year 7 2027	Year 8 2028	Year 9 2029	Year 10 2030
<b>INCOME:</b>					
Low-Income, Rental Assisted	\$9,407	\$9,595	\$9,787	\$9,983	\$10,182
Low-Income, Below 50%	0	0	0	0	0
Low-Income, Below 60%	101,686	103,720	105,794	107,910	110,068
Other Income 100%	106,323	108,449	110,618	112,831	115,087
Market Rate	205,359	209,466	213,656	217,929	222,287
<i>Gross Potential Income</i>	<i>422,775</i>	<i>431,230</i>	<i>439,855</i>	<i>448,652</i>	<i>457,625</i>
Less vacancy	21,139	21,562	21,993	22,433	22,881
<i>Effective Gross Residential Income</i>	<i>401,636</i>	<i>409,669</i>	<i>417,862</i>	<i>426,219</i>	<i>434,744</i>
Commercial Income	0	0	0	0	0
Less vacancy	0	0	0	0	0
Net Commercial Income	0	0	0	0	0
<i>Effective Rental Income</i>	<i>401,636</i>	<i>409,669</i>	<i>417,862</i>	<i>426,219</i>	<i>434,744</i>
Laundry Income	0	0	0	0	0
Other Income: Deposits/Fees	773	788	804	820	837
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
<i>Total Gross Income</i>	<i>402,409</i>	<i>410,457</i>	<i>418,666</i>	<i>427,039</i>	<i>435,580</i>
Operating Subsidies	0	0	0	0	0
Draw on Operating Reserves	0	0	0	0	0
<i>Total Effective Income</i>	<i>\$402,409</i>	<i>\$410,457</i>	<i>\$418,666</i>	<i>\$427,039</i>	<i>\$435,580</i>
<b>EXPENSES:</b>					
Management Fee	20,082	20,484	20,893	21,311	21,738
Administrative	26,753	27,529	28,327	29,149	29,994
Maintenance	23,163	23,835	24,526	25,237	25,969
Resident Services	0	0	0	0	0
Security	0	0	0	0	0
Electrical	9,265	9,534	9,810	10,095	10,388
Natural Gas	0	0	0	0	0
Oil (heat)	0	0	0	0	0
Water & Sewer	9,274	9,552	9,839	10,134	10,438
Replacement Reserve	8,107	8,342	8,584	8,833	9,089
Operating Reserve	0	0	0	0	0
Real Estate Taxes	46,371	47,299	48,245	49,210	50,194
Other Taxes	0	0	0	0	0
Insurance	12,740	13,109	13,489	13,880	14,283
MIP	0	0	0	0	0
Other:	0	0	0	0	0
<i>Total Operating Expenses</i>	<i>\$155,756</i>	<i>\$159,684</i>	<i>\$163,714</i>	<i>\$167,850</i>	<i>\$172,093</i>
<b>NET OPERATING INCOME</b>	<b>\$246,653</b>	<b>\$250,773</b>	<b>\$254,952</b>	<b>\$259,190</b>	<b>\$263,488</b>
Debt Service	\$192,167	\$192,167	\$192,167	\$192,167	\$192,167
Debt Service Coverage	1.28	1.30	1.33	1.35	1.37
Project Cash Flow	\$54,486	\$58,606	\$62,785	\$67,023	\$71,321
Required Debt Coverage (Gap)/Surplus for Cov.	\$220,992	\$220,992	\$220,992	\$220,992	\$220,992
	\$25,661	\$29,781	\$33,960	\$38,198	\$42,496

# 21-Year Operating Proforma (Years 11-15)

**NOTE:** Do not fill out this section. It is automatically filled in by program.

Calendar Year:	Year 11 2031	Year 12 2032	Year 13 2033	Year 14 2034	Year 15 2035
<b>INCOME:</b>					
Low-Income, Rental Assisted	\$10,386	\$10,594	\$10,805	\$11,022	\$11,242
Low-Income, Below 50%	0	0	0	0	0
Low-Income, Below 60%	112,269	114,515	116,805	119,141	121,524
Other Income 100%	117,389	119,737	122,132	124,574	127,066
Market Rate	226,733	231,268	235,893	240,611	245,423
<i>Gross Potential Income</i>	<i>466,777</i>	<i>476,113</i>	<i>485,635</i>	<i>495,348</i>	<i>505,255</i>
Less vacancy	23,339	23,806	24,282	24,767	25,263
<i>Effective Gross Residential Income</i>	<i>443,438</i>	<i>452,307</i>	<i>461,353</i>	<i>470,580</i>	<i>479,992</i>
Commercial (includes parking)	0	0	0	0	0
Less vacancy	0	0	0	0	0
Net Commercial Income	0	0	0	0	0
<i>Effective Rental Income</i>	<i>443,438</i>	<i>452,307</i>	<i>461,353</i>	<i>470,580</i>	<i>479,992</i>
Other Income: Laundry	0	0	0	0	0
Other Income: Deposits/Fees	853	870	888	906	924
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
Other Income:	0	0	0	0	0
<i>Total Gross Income</i>	<i>444,292</i>	<i>453,178</i>	<i>462,241</i>	<i>471,486</i>	<i>480,916</i>
Operating Subsidies	0	0	0	0	0
Draw on Operating Reserves	0	0	0	0	0
<i>Total Effective Income</i>	<i>\$444,292</i>	<i>\$453,178</i>	<i>\$462,241</i>	<i>\$471,486</i>	<i>\$480,916</i>
<b>EXPENSES:</b>					
Management Fee	22,172	22,616	23,068	23,529	24,000
Administrative	30,864	31,759	32,680	33,628	34,603
Maintenance	26,722	27,497	28,294	29,115	29,959
Resident Services	0	0	0	0	0
Security	0	0	0	0	0
Electrical	10,689	10,999	11,318	11,646	11,984
Natural Gas	0	0	0	0	0
Oil (heat)	0	0	0	0	0
Water & Sewer	10,751	11,074	11,406	11,748	12,101
Replacement Reserve	9,353	9,624	9,903	10,190	10,486
Operating Reserve	0	0	0	0	0
Real Estate Taxes	51,198	52,222	53,266	54,331	55,418
Other Taxes	0	0	0	0	0
Insurance	14,697	15,123	15,562	16,013	16,478
MIP	0	0	0	0	0
Other:	0	0	0	0	0
<i>Total Operating Expenses</i>	<i>\$176,446</i>	<i>\$180,914</i>	<i>\$185,498</i>	<i>\$190,202</i>	<i>\$195,028</i>
<b>NET OPERATING INCOME</b>	<b>\$267,845</b>	<b>\$272,264</b>	<b>\$276,743</b>	<b>\$281,284</b>	<b>\$285,887</b>
Debt Service	\$192,167	\$192,167	\$192,167	\$192,167	\$192,167
Debt Service Coverage	1.39	1.42	1.44	1.46	1.49
Project Cash Flow	\$75,679	\$80,097	\$84,577	\$89,118	\$93,720
Required Debt Coverage	\$220,992	\$220,992	\$220,992	\$220,992	\$220,992
(Gap)/Surplus for Cov.	\$46,853	\$51,272	\$55,751	\$60,292	\$64,895



# 21-Year Operating Proforma (Years 16-21)

**NOTE: Do not fill out this section. It is automatically filled in by program.**

Calendar Year:	Year 16 2036	Year 17 2037	Year 18 2038	Year 19 2039	Year 20 2040	Year 21 2041
<b>INCOME:</b>						
Low-Income, Rent. Astd.	\$11,467	\$11,696	\$11,930	\$12,169	\$12,412	\$12,660
Low-Income, Below 50%	0	0	0	0	0	0
Low-Income, Below 60%	123,954	126,434	128,962	131,541	134,172	136,856
Other Income 100%	129,607	132,199	134,843	137,540	140,291	143,097
Market Rate	250,332	255,338	260,445	265,654	270,967	276,386
<b>Gross Potential Income</b>	<b>515,360</b>	<b>525,667</b>	<b>536,180</b>	<b>546,904</b>	<b>557,842</b>	<b>568,999</b>
Less vacancy	25,768	26,283	26,809	27,345	27,892	28,450
<b>Eff. Gross Res. Income</b>	<b>489,592</b>	<b>499,384</b>	<b>509,371</b>	<b>519,559</b>	<b>529,950</b>	<b>540,549</b>
Commercial Income	0	0	0	0	0	0
Less vacancy	0	0	0	0	0	0
Net Commercial Income	0	0	0	0	0	0
<b>Effective Rental Income</b>	<b>489,592</b>	<b>499,384</b>	<b>509,371</b>	<b>519,559</b>	<b>529,950</b>	<b>540,549</b>
Other Income: Laundry	0	0	0	0	0	0
Other Deposits/Fees	942	961	980	1,000	1,020	1,040
Other	0	0	0	0	0	0
Other	0	0	0	0	0	0
Other	0	0	0	0	0	0
Other	0	0	0	0	0	0
Other	0	0	0	0	0	0
<b>Total Gross Income</b>	<b>490,534</b>	<b>500,345</b>	<b>510,352</b>	<b>520,559</b>	<b>530,970</b>	<b>541,589</b>
Operating Subsidies	0	0	0	0	0	0
Draw on Operating Res.	0	0	0	0	0	0
<b>Total Effective Income</b>	<b>\$490,534</b>	<b>\$500,345</b>	<b>\$510,352</b>	<b>\$520,559</b>	<b>\$530,970</b>	<b>\$541,589</b>
<b>EXPENSES:</b>						
Management Fee	24,480	24,970	25,469	25,978	26,498	27,028
Administrative	35,607	36,639	37,702	38,795	39,920	41,078
Maintenance	30,828	31,722	32,642	33,589	34,563	35,565
Resident Services	0	0	0	0	0	0
Security	0	0	0	0	0	0
Electrical	12,331	12,689	13,057	13,436	13,825	14,226
Natural Gas	0	0	0	0	0	0
Oil (heat)	0	0	0	0	0	0
Water & Sewer	12,464	12,838	13,223	13,619	14,028	14,449
Replacement Reserve	10,790	11,103	11,425	11,756	12,097	12,448
Operating Reserve	0	0	0	0	0	0
Real Estate Taxes	56,526	57,657	58,810	59,986	61,186	62,410
Other Taxes	0	0	0	0	0	0
Insurance	16,956	17,447	17,953	18,474	19,010	19,561
MIP	0	0	0	0	0	0
Other:	0	0	0	0	0	0
<b>Total Operating Expenses</b>	<b>\$199,982</b>	<b>\$205,064</b>	<b>\$210,281</b>	<b>\$215,633</b>	<b>\$221,127</b>	<b>\$226,764</b>
<b>NET OPER. INC.</b>	<b>\$290,552</b>	<b>\$295,280</b>	<b>\$300,071</b>	<b>\$304,925</b>	<b>\$309,843</b>	<b>\$314,825</b>
Debt Service	\$192,167	\$192,167	\$192,167	\$192,167	\$192,167	\$192,167
Debt Service Coverage	1.51	1.54	1.56	1.59	1.61	1.64
Project Cash Flow	\$98,386	\$103,113	\$107,904	\$112,758	\$117,676	\$122,658
Required Debt Coverage	\$220,992	\$220,992	\$220,992	\$220,992	\$220,992	\$220,992
(Gap)/Surplus for Cov.	\$69,560	\$74,288	\$79,079	\$83,933	\$88,851	\$93,833

# Operating Expense Analysis

**NOTE: Do not fill out this section. It is automatically filled in by program.**

	<i>Residential Total</i>	<i>Residential Per Unit</i>	<i>Residential Per S. F.</i>	<i>Commercial Total</i>	<i>Commercial Per S. F.</i>
Management Fee	\$18,189	\$1,299.21	\$0.85	\$0	N/A
Payroll, Administrative	\$11,000	\$785.71	\$0.51	\$0	N/A
Payroll Taxes & Benefits, Admin.	\$1,000	\$71.43	\$0.05	\$0	N/A
Legal	\$500	\$35.71	\$0.02	\$0	N/A
Audit	\$5,500	\$392.86	\$0.26	\$0	N/A
Marketing	\$2,600	\$185.71	\$0.12	\$0	N/A
Telephone	\$1,000	\$71.43	\$0.05	\$0	N/A
Office Supplies	\$500	\$35.71	\$0.02	\$0	N/A
Accounting & Data Processing	\$0	\$0.00	\$0.00	\$0	N/A
Investor Servicing	\$0	\$0.00	\$0.00	\$0	N/A
DHCD Monitoring Fee	\$500	\$35.71	\$0.02	\$0	N/A
Other:	\$500	\$35.71	\$0.02	\$0	N/A
Other:	\$0	\$0.00	\$0.00	\$0	N/A
<b>Subtotal: Administrative</b>	<b>\$23,100</b>	<b>\$1,650.00</b>	<b>\$1.08</b>	<b>\$0</b>	<b>N/A</b>
Payroll, Maintenance	\$8,750	\$625.00	\$0.41	\$0	N/A
Payroll Taxes & Benefits, Admin.	\$0	\$0.00	\$0.00	\$0	N/A
Janitorial Materials	\$0	\$0.00	\$0.00	\$0	N/A
Landscaping	\$3,000	\$214.29	\$0.14	\$0	N/A
Decorating (inter. only)	\$2,700	\$192.86	\$0.13	\$0	N/A
Repairs (inter. & ext.)	\$2,000	\$142.86	\$0.09	\$0	N/A
Elevator Maintenance	\$0	\$0.00	\$0.00	\$0	N/A
Trash Removal	\$0	\$0.00	\$0.00	\$0	N/A
Snow Removal	\$2,000	\$142.86	\$0.09	\$0	N/A
Extermination	\$1,050	\$75.00	\$0.05	\$0	N/A
Recreation	\$0	\$0.00	\$0.00	\$0	N/A
Other:	\$500	\$35.71	\$0.02	\$0	N/A
<b>Subtotal: Maintenance</b>	<b>\$20,000</b>	<b>\$1,428.57</b>	<b>\$0.93</b>	<b>\$0</b>	<b>N/A</b>
Resident Services	\$0	\$0.00	\$0.00	\$0	N/A
Security	\$0	\$0.00	\$0.00	\$0	N/A
Electricity	\$8,000	\$571.43	\$0.37	\$0	N/A
Natural Gas	\$0	\$0.00	\$0.00	\$0	N/A
Oil	\$0	\$0.00	\$0.00	\$0	N/A
Water & Sewer	\$8,000	\$571.43	\$0.37	\$0	N/A
<b>Subtotal: Utilities</b>	<b>\$16,000</b>	<b>\$1,142.86</b>	<b>\$0.75</b>	<b>\$0</b>	<b>N/A</b>
Replacement Reserve	\$7,000	\$500.00	\$0.33	\$0	N/A
Operating Reserve	\$0	\$0.00	\$0.00	\$0	N/A
Real Estate Taxes	\$42,000	\$3,000.00	\$1.96	\$0	N/A
Other Taxes	\$0	\$0.00	\$0.00	\$0	N/A
Insurance	\$11,000	\$785.71	\$0.51	\$0	N/A
MIP	\$0	\$0.00	\$0.00	\$0	N/A
Other:	\$0	\$0.00	\$0.00	\$0	N/A
<b>Subtotal: Taxes, Insurance</b>	<b>\$53,000</b>	<b>\$3,785.71</b>	<b>\$2.48</b>	<b>\$0</b>	<b>N/A</b>
<b>TOTAL EXPENSES</b>	<b>\$137,289</b>	<b>\$9,806.36</b>	<b>\$6.42</b>	<b>\$0</b>	<b>N/A</b>

# Development Cost Analysis

NOTE: Do not fill out this section. It is automatically filled in by program.

	Residential Total	Residential Per Unit	Residential Per S. F.	Commercial Total	Commercial Per S. F.
Acquisition: Land	\$1,011,000	\$72,214	\$43.04	\$0	N/A
Acquisition: Building	\$0	\$0	\$0.00	\$0	N/A
<b>Acquisition Subtotal</b>	<b>\$1,011,000</b>	<b>\$72,214</b>	<b>\$43.04</b>	<b>\$0</b>	<b>N/A</b>
Direct Construction Budget	\$9,607,256	\$686,233	\$408.98	\$0	N/A
Construction Contingency	\$485,000	\$34,643	\$20.65	\$0	N/A
<b>Subtotal: Construction</b>	<b>\$10,092,256</b>	<b>\$720,875</b>	<b>\$429.62</b>	<b>\$0</b>	<b>N/A</b>
<b>General Development Costs:</b>					
Architecture & Engineering	\$500,000	\$35,714	\$21.28	\$0	N/A
Survey and Permits	\$37,500	\$2,679	\$1.60	\$0	N/A
Clerk of the Works	\$23,000	\$1,643	\$0.98	\$0	N/A
Environmental Engineer	\$20,000	\$1,429	\$0.85	\$0	N/A
Bond Premium	\$59,790	\$4,271	\$2.55	\$0	N/A
Legal	\$130,000	\$9,286	\$5.53	\$0	N/A
Title and Recording	\$15,000	\$1,071	\$0.64	\$0	N/A
Accounting & Cost Certificat.	\$11,000	\$786	\$0.47	\$0	N/A
Marketing and Rent Up	\$40,000	\$2,857	\$1.70	\$0	N/A
Real Estate Taxes	\$26,000	\$1,857	\$1.11	\$0	N/A
Insurance	\$62,000	\$4,429	\$2.64	\$0	N/A
Relocation	\$0	\$0	\$0.00	\$0	N/A
Appraisal	\$8,000	\$571	\$0.34	\$0	N/A
Security	\$0	\$0	\$0.00	\$0	N/A
Construction Loan Interest	\$180,000	\$12,857	\$7.66	\$0	N/A
Inspecting Engineer	\$9,000	\$643	\$0.38	\$0	N/A
Fees to: DHCD	\$58,168	\$4,155	\$2.48	\$0	N/A
Fees to: 0	\$0	\$0	\$0.00	\$0	N/A
MIP	\$0	\$0	\$0.00	\$0	N/A
Credit Enhancement Fees	\$8,000	\$571	\$0.34	\$0	N/A
Letter of Credit Fees	\$0	\$0	\$0.00	\$0	N/A
Other Financing Fees	\$59,000	\$4,214	\$2.51	\$0	N/A
Development Consultant	\$16,000	\$1,143	\$0.68	\$0	N/A
Other:	\$6,000	\$429	\$0.26	\$0	N/A
Other:	\$0	\$0	\$0.00	\$0	N/A
Soft Cost Contingency	\$20,000	\$1,429	\$0.85	\$0	N/A
<b>Subtotal: Gen. Dev.</b>	<b>\$1,288,458</b>	<b>\$92,033</b>	<b>\$54.85</b>	<b>\$0</b>	<b>N/A</b>
<b>Subtotal: Acquis., Const., and Gen. Dev.</b>	<b>\$12,391,714</b>	<b>\$885,122</b>	<b>\$527.51</b>	<b>\$0</b>	<b>N/A</b>
Capitalized Reserves	\$162,000	\$11,571	\$6.90	\$0	N/A
Developer Overhead	\$150,000	\$10,714	\$6.39	\$0	N/A
Developer Fee	\$750,000	\$53,571	\$31.93	\$0	N/A
<b>Total Development Cost</b>	<b>\$13,453,714</b>	<b>\$960,980</b>	<b>\$572.72</b>	<b>\$0</b>	<b>N/A</b>
<b>Total Net* Development Cost</b>	<b>\$13,249,542</b>	<b>\$946,396</b>	<b>\$564.03</b>	<b>\$0</b>	<b>N/A</b>

(\*Does not include any capitalized reserves nor any developer's fees or overhead which are contributed or loaned to the project.)

Project Sources and Uses

	1	5	3	5
	ADD ADDITIONAL COLUMNS AS NEEDED TO REFLECT INCOME LIMITS			
	Affordable Units Below 100% of AMI		Affordable Units Below 60% AMI	
	Below 30% AMI	Below 60% AMI	Below 100% of AMI	Below 100% of AMI
Original Total	Market Rate	Market Rate	Market Rate	Market Rate
<b>Construction Financing</b>				
Construction Lender	\$ 225,662	\$ 1,130,312	\$ 2,210,759	\$ 3,683,287
Developer Equity	\$ 0	\$ 0	\$ 0	\$ 0
Fed HTC (Define Yield)	\$ 0	\$ 0	\$ 0	\$ 0
State HTC (Define Yield)	\$ 443,119	\$ 2,215,595	\$ 0	\$ 0
LIHTC (9%)	\$ 212,500	\$ 1,062,500	\$ 637,500	\$ 1,062,500
DND	\$ 0	\$ 0	\$ 0	\$ 0
NHT	\$ 0	\$ 0	\$ 0	\$ 0
DHDC (State LIHTC)	\$ 0	\$ 0	\$ 0	\$ 0
DHDC (HSF)	\$ 270,000	\$ 225,000	\$ 0	\$ 0
DHCD (AHITF)	\$ 300,000	\$ 250,000	\$ 0	\$ 0
MassCEC	\$ 0	\$ 0	\$ 0	\$ 0
Value of Solar PV	\$ 0	\$ 0	\$ 0	\$ 0
Other Sources (List Name)	\$ 0	\$ 0	\$ 0	\$ 0
Other Sources (List Name)	\$ 0	\$ 0	\$ 0	\$ 0
Deferred Fee	\$ 0	\$ 0	\$ 0	\$ 0
Market Rate Cross Subsidy	\$ 0	\$ 0	\$ 0	\$ 0
<b>Total Construction Financing</b>	<b>\$976,281</b>	<b>\$4,883,407</b>	<b>\$2,848,259</b>	<b>\$4,745,787</b>
<b>Surplus/Gap</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>
<b>Permanent Financing</b>				
Permanent Loan, Boston Private	\$ 0	\$ 500,000	\$ 800,000	\$ 1,600,000
Developer Equity	\$ 0	\$ 0	\$ 0	\$ 0
Fed HTC (Define Yield?)	\$ 0	\$ 0	\$ 0	\$ 0
State HTC (Define Yield?)	\$ 841,200	\$ 4,208,000	\$ 0	\$ 0
LIHTC (9%)	\$ 212,500	\$ 1,062,500	\$ 637,500	\$ 1,062,500
DND	\$ 0	\$ 0	\$ 0	\$ 0
NHT	\$ 0	\$ 0	\$ 0	\$ 0
DHDC (State LIHTC)	\$ 221,867	\$ 1,108,333	\$ 0	\$ 0
DHDC (HSF)	\$ 300,000	\$ 250,000	\$ 0	\$ 0
DHCD (AHITF)	\$ 300,000	\$ 250,000	\$ 0	\$ 0
DHCD - CIPF	\$ 0	\$ 0	\$ 0	\$ 0
MassCEC	\$ 36,496	\$ 13,034	\$ 7,821	\$ 13,034
Value of Solar PV	\$ 522,846	\$ 186,731	\$ 112,038	\$ 186,731
Other Sources (List Name)	\$ 0	\$ 0	\$ 0	\$ 0
Deferred Fee	\$ 42,172	\$ 15,061	\$ 9,037	\$ 15,061
Market Rate Cross Subsidy	\$ 0	\$ 0	\$ 0	\$ 0
<b>Total Permanent Financing</b>	<b>\$976,281</b>	<b>\$4,883,407</b>	<b>\$2,848,260</b>	<b>\$4,745,788</b>
<b>Surplus/Gap</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

int. rate term  
3.75% 2.00

Annual Payment  
\$ 25% 30 \$182,167

USES OF CASH	DEVELOPMENT PRO FORMA					Residential Per Unit for Units at or below 100% Per Unit	Comments
	14	1	5	3	5		
	Original Total	Affordable Units Below 30% AMI	Affordable Units Below 80% AMI	Affordable Units Below 100% of AMI	Market Rate	Commercial	
Acquisition - Land	1,011,000	\$ 72,214	\$ 361,071	\$ 216,640	\$ 381,071	72,214	72,214
Acquisition - Building	0	\$ 72,214	\$ 361,071	\$ 216,640	\$ 381,071	0	72,214
Subtotal: Acquisition	1,011,000	\$ 72,214	\$ 361,071	\$ 216,640	\$ 381,071	72,214	72,214
Direct Construction Budget	9,807,256	\$ 686,233	\$ 3,431,163	\$ 2,050,698	\$ 3,431,163	686,233	686,233
Contingency	485,000	\$ 34,843	\$ 173,214	\$ 103,929	\$ 173,214	34,843	34,843
5%	10,062,256	\$ 720,876	\$ 3,604,377	\$ 2,162,328	\$ 3,604,377	720,876	720,876
Subtotal: Construction	500,000	\$ 35,714	\$ 178,571	\$ 107,143	\$ 178,571	35,714	35,714
Architecture and Engineering	37,500	\$ 2,679	\$ 13,393	\$ 8,038	\$ 13,393	2,679	2,679
Survey and Permits	23,000	\$ 1,643	\$ 8,214	\$ 4,929	\$ 8,214	1,643	1,643
Clerk of the Works	20,000	\$ 1,429	\$ 7,143	\$ 4,286	\$ 7,143	1,429	1,429
Environmental Engineer	59,790	\$ 4,271	\$ 21,354	\$ 12,912	\$ 21,354	4,271	4,271
Bond Premium	130,000	\$ 18,000	\$ 92,000	\$ 8,000	\$ 12,000	13,111	8,286
Legal	15,000	\$ 1,071	\$ 5,357	\$ 3,214	\$ 5,357	1,071	1,071
Title and Recording	11,000	\$ 1,833	\$ 9,167	\$ 5,357	\$ 9,167	1,222	786
Accounting and Cost Certification	40,000	\$ 2,857	\$ 14,286	\$ 8,571	\$ 14,286	2,857	2,857
Marketing and Rent Up	26,000	\$ 1,857	\$ 9,286	\$ 5,374	\$ 9,286	1,857	1,857
Real Estate Taxes	62,000	\$ 4,429	\$ 22,143	\$ 13,285	\$ 22,143	4,429	4,429
Insurance	0	\$ -	\$ -	\$ -	\$ -	0	0
Relocation	8,000	\$ 571	\$ 2,857	\$ 1,714	\$ 2,857	571	571
Appraisal	0	\$ -	\$ -	\$ -	\$ -	0	0
Security	0	\$ -	\$ -	\$ -	\$ -	0	0
Acquisition Loan Interest	9,000	\$ 643	\$ 3,214	\$ 1,929	\$ 3,214	643	643
Inspecting Engineer	180,000	\$ 12,857	\$ 64,286	\$ 38,571	\$ 64,286	12,857	12,857
Construction Loan Interest	0	\$ -	\$ -	\$ -	\$ -	0	0
Pre Development Loan Interest	58,168	\$ 9,806	\$ 48,473	\$ 4,429	\$ 9,806	6,463	4,155
Fees to: Mass Housing	8,000	\$ 571	\$ 2,857	\$ 1,714	\$ 2,857	571	571
Fees to: CEDAC & DHCD	0	\$ -	\$ -	\$ -	\$ -	0	0
Fees to: IC	0	\$ -	\$ -	\$ -	\$ -	0	0
MIP	0	\$ -	\$ -	\$ -	\$ -	0	0
Credit Enhancement Fees	0	\$ -	\$ -	\$ -	\$ -	0	0
Letter of Credit Fees	0	\$ -	\$ -	\$ -	\$ -	0	0
Other Financing Fees:	59,000	\$ 4,214	\$ 21,071	\$ 12,643	\$ 21,071	4,214	4,214
Development Consultant: Energy	16,000	\$ 1,143	\$ 5,714	\$ 3,429	\$ 5,714	1,143	1,143
Prfm A & E costs & CNA	0	\$ -	\$ -	\$ -	\$ -	0	0
Other FF&E	8,000	\$ 429	\$ 2,143	\$ 1,283	\$ 2,143	429	429
Soft Cost Contingency	20,000	\$ 1,429	\$ 7,143	\$ 4,357	\$ 7,143	1,429	1,429
16%	1,283,456	\$ 107,334	\$ 638,872	\$ 261,118	\$ 601,032	90,003	92,033
Subtotal: General Development	12,391,714	\$ 900,424	\$ 4,504,121	\$ 2,620,488	\$ 4,504,121	881,683	835,122
Subtotal: Acq, Const. and Gen. Dev.	162,000	\$ 11,571	\$ 57,857	\$ 34,714	\$ 57,857	11,571	11,571
Capitalized Reserves	150,000	\$ 10,714	\$ 53,571	\$ 32,143	\$ 53,571	10,714	10,714
Developer Overhead	750,000	\$ 53,571	\$ 267,857	\$ 160,714	\$ 267,857	53,571	53,571
Developer Fee							
Total Development Cost	13,453,714	\$ 976,251	\$ 4,883,408	\$ 2,841,200	\$ 4,745,768	967,550	960,880

Maximum Fee Calculation:	Basis:	TDC
Less: Acquisition Fee & OH Reserves	-1,071,700	
	-900,000	
	-162,000	
DND BASIS	11,380,714	
First \$3,000,000 of Basis	15%	450,000
Between \$3,000,000 and \$5,000,000	12.5%	250,000
Basis over \$5,000,000	10%	638,071
Allowed Fee on Acquisition	5%	50,550
Maximum Fee & OH Allowed		1,388,621
Total Requested Fee: OH & Consultant:		916,000
Variance		472,621

# BOSTON PRIVATE

▫ COMMUNITY INVESTMENT ▫

February 12, 20118

Mr. Jon Rudzinski  
Rees-Larkin Development  
179 Boylston Street, Building P  
Jamaica Plain, MA 02130

Via email

**Re: Financing for Marcella-Highland, Boston, MA**

Dear Jon:

Boston Private is pleased to offer this strong letter of interest to provide financing for the "Marcella-Highland" project (the "Project"). This Project is part of an exciting new approach to creating affordable- and middle-income housing opportunities in the city and region. We would be eager to be involved. We are proud of our previous work with you, and we would look forward to engaging with you on this new endeavor.

We understand that the Project involves proposals for 2 of the "packages" in the City's disposition RFP and that the aggregate proposal involves the new construction, according to "Passive House" standards of 37 units of rental housing. As you have requested, we are eager to consider financing with respect to the "packages" as follows:

**Construction financing:**

Package 2	\$7,250,000
Package 4	\$7,750,000
TOTAL	\$15,000,000.

**Permanent Financing:**

Package 2	\$2,900,000
Package 4	\$3,300,000
TOTAL	\$6,200,000.

This financing is well within our standard financing programs and we would immediately pursue the underwriting and due diligence for this financing upon your designation by the City. Please be aware that this is not a commitment of funds, and that any commitment is fully conditioned upon further due diligence and review and approval of the Bank's Loan Committees.

We are delighted to work again with you again to provide stable affordable housing for some of the Commonwealth's neediest families. Please feel free to contact me at 617-912-3701 with any questions. Thank you.

Sincerely,



Peter Hollands  
Senior Vice President

cc: Howard Tarlow, Boston Private  
Esther Schlorholtz, Boston Private



Massachusetts  
Housing  
Investment  
Corporation

21 Custom House Street  
8<sup>th</sup> Floor  
Boston, MA 02110  
(617) 850-1000

Guilliaem Aertsen  
*Chairman*

Joseph L. Flatley  
*President and CEO*

February 13, 2018

Jon Rudzinski, Principal  
Rees-Larkin Development  
179 Boylston Street, Building P  
Jamaica Plain, MA 02130

Re: Marcella-Highland ("Project")  
Boston, MA 02119

Dear Mr. Rudzinski:

Thank you for your interest in having MIIC purchase the federal low-income housing tax credits for the proposed project. As planned, the Project will create 37 new units of rental housing, of which 16 will be reserved for households at an income level less than 60% of AMI. Total development costs for the Project will be approximately \$26.8 million. The project is expected to qualify for \$1,000,000 of federal LIHTC.

Based on your current assumptions, you expect to raise \$9,000,000 of federal tax credit equity, which is equivalent to .90 cents per dollar of federal LIHTC, net of all fees. We would also be happy to help you place \$700,000 of state LIHTC at a price of .76 cents per dollar, which would yield \$2,600,000 in equity. We have reviewed your financial assumptions for the project. We have found them to be reasonable and consistent with our underwriting guidelines and the current tax credit equity market. We are prepared to provide a detailed term sheet as soon as your construction, occupancy and credit delivery schedules are more refined.

This is an offer to purchase the federal low-income housing tax credits, subject to completion of normal and customary due diligence and approval of our Board of Directors.

Sincerely,

Bruce Ehrlich  
Senior Investment Officer

E+ Marcella/Highland, Package 2

Net Present Value of Benefits  
Solar PV Electricity

8.0%

Year	Energy Value	REC Value	Project Expense	Grant / Rebate	ITC	Tax Benefit	Purchase/ Install	Annual Cash Flow	NPV
0	\$0	\$0	\$0	\$0	\$0	\$0	(\$266,669)	(\$266,669)	(\$266,669)
1	\$34,573	\$0	(\$1,569)	\$0	\$80,001	\$51,611	\$0	\$164,616	\$152,422
2	\$34,400	\$0	(\$1,569)	\$0	\$0	\$4,726	\$0	\$37,557	\$32,199
3	\$34,228	\$0	(\$1,569)	\$0	\$0	\$3,007	\$0	\$35,666	\$28,313
4	\$34,057	\$0	(\$1,569)	\$0	\$0	\$2,058	\$0	\$34,546	\$25,392
5	\$33,887	\$0	(\$1,569)	\$0	\$0	\$2,058	\$0	\$34,376	\$23,396
6	\$33,717	\$0	(\$1,569)	\$0	\$0	\$1,039	\$0	\$33,187	\$20,914
7	\$33,549	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$32,409	\$18,910
8	\$33,381	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$32,241	\$17,419
9	\$33,214	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$32,074	\$16,045
10	\$33,048	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$31,908	\$14,780
11	\$32,883	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$31,743	\$13,614
12	\$32,718	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$31,578	\$12,540
13	\$32,555	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$31,415	\$11,551
14	\$32,392	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$31,252	\$10,640
15	\$32,230	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$31,090	\$9,801
16	\$32,069	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$30,929	\$9,028
17	\$31,908	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$30,768	\$8,316
18	\$31,749	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$30,609	\$7,660
19	\$31,590	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$30,450	\$7,056
20	\$31,432	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$30,292	\$6,499
21	\$32,700	\$0	(\$7,263)	\$0	\$0	\$1,984	\$0	\$27,421	\$5,447
22	\$33,350	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$32,210	\$5,925
23	\$34,013	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$32,873	\$5,599
24	\$34,689	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$33,549	\$5,291
25	\$35,379	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$34,239	\$4,999
26	\$36,082	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$34,942	\$4,724
27	\$36,798	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$35,658	\$4,464
28	\$37,530	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$36,390	\$4,218
29	\$38,275	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$37,135	\$3,986
30	\$39,036	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$37,896	\$3,766
31	\$39,812	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$38,672	\$3,558
32	\$40,603	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$39,463	\$3,362
33	\$41,409	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$40,269	\$3,177
34	\$42,232	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$41,092	\$3,002
35	\$43,071	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$41,931	\$2,836
36	\$43,927	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$42,787	\$2,680
37	\$44,800	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$43,660	\$2,532
38	\$45,690	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$44,550	\$2,392
39	\$46,598	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$45,458	\$2,260
40	\$47,524	\$0	(\$1,569)	\$0	\$0	\$429	\$0	\$46,384	\$2,135

Cumulative Net Present Value: **\$256,177**

less Cost of Purchase/Installation: \$266,669

Gross Cum. NPV (n/I Cost of Purchase/Install) **\$522,846**



## Commercial PV Project Cash Flow - 2 Marcella Multi Roof

System Design	
Annual Generation	110300
System Size in kW (DC)	94.90
System Size in kW (AC)	72.60
Turnkey Price	\$266,669
Annual Output Derate	0.5%

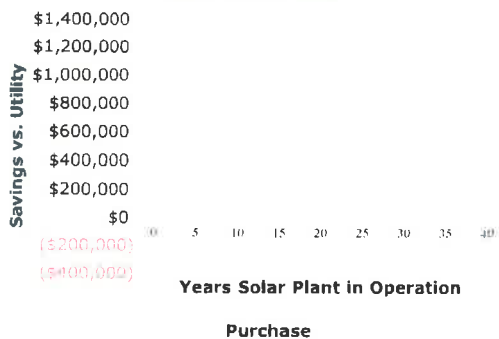
Project Income	
Y1 Utility Rate	\$0.2000
Utility Escalator	2.5%
Tariff Rate (\$/kWh)	\$0.00
Tariff Term (years)	0
Y1 REC Volume	0
REC Price (\$/MWh)	\$0.00
REC Term (years)	10
REC Depreciation	5%
Y1 REC Management Fee	\$0
Est. Total REC Value	\$0

Tax Assumptions		
State		MA
Non-Profit?		No
ITC		30%
Install Quarter		Q2
Bonus Depreciation		Yes
Federal Tax Rate (1, 2)	21.0%	N/A
State Tax Rate		8.0%
Effective Tax Rate (1, 2)	27.3%	N/A
Total Depreciation Benefit		\$61,926

Project Expenses	
O&M	\$1,569
O&M Escalator	0%
Insurance	\$0
Insurance De-Escalator	0%
Inverter Replacement (Y21)	\$5,694
Property Tax (Y1)	\$0
Property Tax De-Escalator	\$0
Land Lease (\$/year)	\$0
Land Lease Escalator	0%

Year	Gen.	Energy Value \$/kWh	Energy Value	REC Value	Project Expense	Grant or Rebate	ITC	Tax Benefits	Purchase Annual Cash Flow	Purchase Cum. Cash Flow
0									(\$266,669)	(\$266,669)
1	110,300	\$0.3134	\$34,573	\$0	(\$1,569)	\$0	\$80,001	\$51,611	\$164,615	(\$102,054)
2	109,749	\$0.3134	\$34,400	\$0	(\$1,569)	\$0	\$0	\$4,726	\$37,557	(\$64,497)
3	109,200	\$0.3134	\$34,228	\$0	(\$1,569)	\$0	\$0	\$3,007	\$35,666	(\$28,831)
4	108,654	\$0.3134	\$34,057	\$0	(\$1,569)	\$0	\$0	\$2,058	\$34,545	\$5,714
5	108,110	\$0.3134	\$33,887	\$0	(\$1,569)	\$0	\$0	\$2,058	\$34,375	\$40,089
6	107,570	\$0.3134	\$33,717	\$0	(\$1,569)	\$0	\$0	\$1,039	\$33,187	\$73,276
7	107,032	\$0.3134	\$33,549	\$0	(\$1,569)	\$0	\$0	\$429	\$32,408	\$105,684
8	106,497	\$0.3134	\$33,381	\$0	(\$1,569)	\$0	\$0	\$429	\$32,240	\$137,924
9	105,964	\$0.3134	\$33,214	\$0	(\$1,569)	\$0	\$0	\$429	\$32,073	\$169,998
10	105,435	\$0.3134	\$33,048	\$0	(\$1,569)	\$0	\$0	\$429	\$31,907	\$201,905
11	104,907	\$0.3134	\$32,883	\$0	(\$1,569)	\$0	\$0	\$429	\$31,742	\$233,647
12	104,383	\$0.3134	\$32,718	\$0	(\$1,569)	\$0	\$0	\$429	\$31,578	\$265,225
13	103,861	\$0.3134	\$32,555	\$0	(\$1,569)	\$0	\$0	\$429	\$31,414	\$296,639
14	103,342	\$0.3134	\$32,392	\$0	(\$1,569)	\$0	\$0	\$429	\$31,251	\$327,890
15	102,825	\$0.3134	\$32,230	\$0	(\$1,569)	\$0	\$0	\$429	\$31,089	\$358,979
16	102,311	\$0.3134	\$32,069	\$0	(\$1,569)	\$0	\$0	\$429	\$30,928	\$389,908
17	101,799	\$0.3134	\$31,908	\$0	(\$1,569)	\$0	\$0	\$429	\$30,768	\$420,675
18	101,290	\$0.3134	\$31,749	\$0	(\$1,569)	\$0	\$0	\$429	\$30,608	\$451,284
19	100,784	\$0.3134	\$31,590	\$0	(\$1,569)	\$0	\$0	\$429	\$30,450	\$481,733
20	100,280	\$0.3134	\$31,432	\$0	(\$1,569)	\$0	\$0	\$429	\$30,292	\$512,025
21	99,779	\$0.3277	\$32,700	\$0	(\$1,569)	\$0	\$0	\$1,984	\$27,421	\$539,446
22	99,280	\$0.3359	\$33,350	\$0	(\$1,569)	\$0	\$0	\$429	\$32,209	\$571,655
23	98,783	\$0.3443	\$34,012	\$0	(\$1,569)	\$0	\$0	\$429	\$32,872	\$604,526
24	98,289	\$0.3529	\$34,688	\$0	(\$1,569)	\$0	\$0	\$429	\$33,548	\$638,074
25	97,798	\$0.3617	\$35,378	\$0	(\$1,569)	\$0	\$0	\$429	\$34,237	\$672,312
26	97,309	\$0.3708	\$36,081	\$0	(\$1,569)	\$0	\$0	\$429	\$34,940	\$707,252
27	96,822	\$0.3801	\$36,798	\$0	(\$1,569)	\$0	\$0	\$429	\$35,658	\$742,909
28	96,338	\$0.3896	\$37,530	\$0	(\$1,569)	\$0	\$0	\$429	\$36,389	\$779,298
29	95,857	\$0.3993	\$38,275	\$0	(\$1,569)	\$0	\$0	\$429	\$37,135	\$816,433
30	95,377	\$0.4093	\$39,036	\$0	(\$1,569)	\$0	\$0	\$429	\$37,896	\$854,329
31	94,900	\$0.4195	\$39,812	\$0	(\$1,569)	\$0	\$0	\$429	\$38,671	\$893,000
32	94,426	\$0.4300	\$40,603	\$0	(\$1,569)	\$0	\$0	\$429	\$39,463	\$932,463
33	93,954	\$0.4408	\$41,410	\$0	(\$1,569)	\$0	\$0	\$429	\$40,270	\$972,732
34	93,484	\$0.4518	\$42,233	\$0	(\$1,569)	\$0	\$0	\$429	\$41,093	\$1,013,825
35	93,017	\$0.4631	\$43,073	\$0	(\$1,569)	\$0	\$0	\$429	\$41,932	\$1,055,757
36	92,551	\$0.4746	\$43,929	\$0	(\$1,569)	\$0	\$0	\$429	\$42,788	\$1,098,545
37	92,089	\$0.4865	\$44,802	\$0	(\$1,569)	\$0	\$0	\$429	\$43,661	\$1,142,206
38	91,628	\$0.4987	\$45,692	\$0	(\$1,569)	\$0	\$0	\$429	\$44,552	\$1,186,758
39	91,170	\$0.5111	\$46,600	\$0	(\$1,569)	\$0	\$0	\$429	\$45,460	\$1,232,217
40	90,714	\$0.5239	\$47,527	\$0	(\$1,569)	\$0	\$0	\$429	\$46,386	\$1,278,603

**Solar Ownership**



**40 Year Cost of Energy**





# LEED v4 for Building Design and Construction: Homes and Multifamily Lowrise Project Checklist

Project Name: DND E+ Marcella and Highland Streets - Package 2  
 Date: 2/5/2018

Y	?	N	Credit	Integrative Process	Points
13	2	0	Required	Location and Transportation	15
Y			Prereq	Floodplain Avoidance	Required
<b>PERFORMANCE PATH</b>					
			Credit	LEED for Neighborhood Development Location	15
<b>PRESCRIPTIVE PATH</b>					
7	1		Credit	Site Selection	8
2	1		Credit	Compact Development	3
2			Credit	Community Resources	2
2			Credit	Access to Transit	2
<b>5 0 2 Sustainable Sites</b>					
Y			Prereq	Construction Activity Pollution Prevention	Required
Y			Prereq	No Invasive Plants	Required
3	2		Credit	Heat Island Reduction	2
2			Credit	Rainwater Management	3
			Credit	Non-Toxic Pest Control	2
<b>6 4 0 Water Efficiency</b>					
Y			Prereq	Water Metering	Required
<b>PERFORMANCE PATH</b>					
			Credit	Total Water Use	12
<b>PRESCRIPTIVE PATH</b>					
4	2		Credit	Indoor Water Use	6
2	2		Credit	Outdoor Water Use	4
<b>36 1 1 Energy and Atmosphere</b>					
Y			Prereq	Minimum Energy Performance	Required
Y			Prereq	Energy Metering	Required
Y			Prereq	Education of the Homeowner, Tenant or Building Manager	Required
<b>PERFORMANCE PATH</b>					
29			Credit	Annual Energy Use	29
<b>BOTH PATHS</b>					
4	1		Credit	Efficient Hot Water Distribution System	5
2			Credit	Advanced Utility Tracking	2
			Credit	Active Solar Ready Design	1
1			Credit	HVAC Start-Up Credentialing	1
<b>PRESCRIPTIVE PATH</b>					
Y			Prereq	Home Size	Required
			Credit	Building Orientation for Passive Solar	3
			Credit	Air Infiltration	2
			Credit	Envelope Insulation	2
			Credit	Windows	3
			Credit	Space Heating & Cooling Equipment	4
<b>EA PRESCRIPTIVE PATH (continued)</b>					
			Credit	Heating & Cooling Distribution Systems	3
			Credit	Efficient Domestic Hot Water Equipment	3
			Credit	Lighting	2
			Credit	High Efficiency Appliances	2
			Credit	Renewable Energy	4
<b>5 5 0 Materials and Resources</b>					
Y			Prereq	Certified Tropical Wood	Required
Y			Prereq	Durability Management	Required
1			Credit	Durability Management Verification	1
1	3		Credit	Environmentally Preferable Products	4
2	1		Credit	Construction Waste Management	3
1	1		Credit	Material Efficient Framing	2
<b>15 1 0 Indoor Environmental Quality</b>					
Y			Prereq	Ventilation	Required
Y			Prereq	Combustion Venting	Required
Y			Prereq	Garage Pollutant Protection	Required
Y			Prereq	Radon-Resistant Construction	Required
Y			Prereq	Air Filling	Required
Y			Prereq	Environmental Tobacco Smoke	Required
Y			Prereq	Compartmentalization	Required
3			Credit	Enhanced Ventilation	3
1	1		Credit	Contaminant Control	2
3			Credit	Balancing of Heating and Cooling Distribution Systems	3
1			Credit	Enhanced Compartmentalization	1
2			Credit	Enhanced Combustion Venting	2
2			Credit	Enhanced Garage Pollutant Protection	2
3			Credit	Low Emitting Products	3
<b>5 1 0 Innovation</b>					
Y			Prereq	Preliminary Rating	Required
4	1		Credit	Innovation	5
1			Credit	LEED AP Homes	1
<b>2 2 0 Regional Priority</b>					
1			Credit	Regional Priority: Specific Credit	1
1			Credit	Regional Priority: Specific Credit	1
1	1		Credit	Regional Priority: Specific Credit	1
1	1		Credit	Regional Priority: Specific Credit	1
<b>89 16 3 TOTALS</b>					
Certified: 40 to 49 points, Silver: 50 to 59 points, Gold: 60 to 79 points, Platinum: 80 to 110					Possible Points: 110

# Home Energy Rating Certificate

## Projected Report

Rating Date: 1/26/2018  
 Registry ID: Unregistered  
 Rating Number:



### HERS® Index Score:

**-10**

Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit

**Annual Savings**  
**\$4,394**

\*Relative to an average US home

### Your Home's Estimated Energy Use:

Use [MBtu]	Annual Cost
Heating	3.5 \$175
Cooling	1.1 \$53
Hot Water	2.1 \$107
Lights/Appliances	15.9 \$794
Service Charges	\$45
Generation (e.g. Solar)	-51,127
<b>Total:</b>	<b>\$48</b>

**Home:** Bldg A - Unit 1 Marcella St, Boston, MA  
**Builder:** Rees-Larkin Development

### This home meets or exceeds the criteria of the following:

- Energy Star v3
- Energy Star v3.1
- 2006 International Energy Conservation Code
- 2009 International Energy Conservation Code
- 2012 International Energy Conservation Code
- 2015 International Energy Conservation Code

### Rating Completed by:

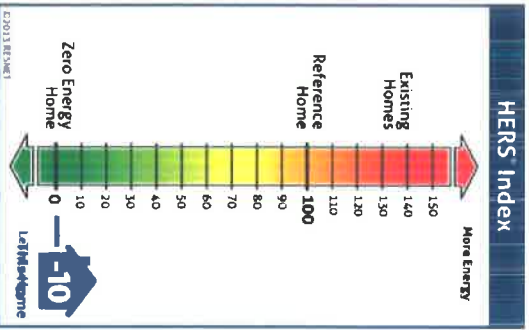
**Energy Rater:** Michael A Browne  
 RESNET ID: 3992602

**Rating Company:** Advanced Building Analysis, LLC  
 2 Woodlawn St, Amesbury, MA 01913  
 (978) 270-3911

**Rating Provider:** Energy Raters of Massachusetts



Michael A Browne, Certified Energy Rater



### Home Feature Summary:

Home Type: Townhouse, end unit  
 Conditioned Floor Area: 1,684 sq. ft.  
 Number of Bedrooms: 3  
 Primary Heating System: Air Source Heat Pump, Efficiency: 2.93255 COP  
 Primary Cooling System: Air Source Heat Pump, Efficiency: 19 SEER  
 Primary Water Heating: Water Heater, Efficiency: 24 Energy Factor  
 House Tightness: 0.55 ACH50  
 Duct Leakage to Outside: 0 CFM25  
 Above Grade Walls: R-35  
 Ceiling: Vaulted Roof R-54  
 Window Type: U-Value: 0.175 SHGC: 0.55  
 Foundation Walls: N/A



The Home Energy Rating Standard Disclosure for this house is available from the rating provider.

This report does not constitute any warranty or guarantee.

Ekotrope RATER - Version 2.2.4.1860

# ENERGY STAR V3.1 Home Report



**Property**  
Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

**Organization**  
Advanced Building Analysis  
(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

Bldg A - Unit 1  
E+ Marcella St, 2 A - 1

**Builder**  
Rees-Larkin Development

## Mandatory Requirements

- ✓ Duct leakage at post construction better than or equal to ENERGY STAR v3/3.1 requirements.
- ✓ Envelope insulation levels meet or exceed ENERGY STAR v3/3.1 requirements.
- ✓ Slab on Grade Insulation must be > R-5, and at IECC 2009 Depth for Climate Zones 4 and above.
- ✓ Envelope insulation achieves RESNET Grade I installation, or Grade II with insulated sheathing.
- ✓ Windows meet the 2009 IECC Requirements - Table 402.1.1.
- ✓ Duct insulation meets the EPA minimum requirements of R-6.
- ✓ Mechanical ventilation system is installed in the home.
- ✓ ENERGY STAR Checklists fully verified and complete.

## HERS Index Target

Reference Home HERS	65
SAF (Size Adjustment Factor)	1.00
SAF Adjusted HERS Target	<u>65</u>
As Designed Home HERS	-10
As Designed Home HERS w/o PV	31

## Normalized, Modified End-Use Loads (MBtu / year)

	ENERGY STAR	As Designed
Heating	22.5	5.1
Cooling	2.9	3.1
Water Heating	10.1	1.9
Lights and Appliances	18.5	15.9
<b>Total</b>	<b>54.0</b>	<b>26.1</b>



This home **MEETS** or **EXCEEDS** the energy efficiency requirements for designation as an EPA ENERGY STAR Qualified Home under Version 3.1

## Pollution Prevented

Type of Emissions	Reduction
Carbon Dioxide (CO <sub>2</sub> ) - tons/yr	15.4

## Energy Cost Savings

	\$/yr
Heating	513
Cooling	-3
Water Heating	465
Lights & Appliances	129
<b>Generation Savings</b>	<b>1,127</b>
<b>Total</b>	<b>2,231</b>

The energy savings and pollution prevented are calculated by comparing the Rated Home to the ENERGY STAR Version 3.1 Reference Home as defined in the ENERGY STAR Qualified Homes HERS Index Target Procedure for National Program Requirements, Version 3.1 promulgated by the Environmental Protection Agency (EPA). In accordance with the ANSI/RESNET/ICC 301-2014 Standard, building inputs affecting setpoints infiltration rates, window shading and the existence of mechanical systems may have been changed prior to calculating loads

Ekotrope RATER - Version 2.2.4.1860

This information does not constitute a warranty or guarantee of home energy performance

Marcella Street 2A-1

REES-LARKIN DEVELOPMENT



# 2015 IECC R-406 Projected Energy Rating Index Report

## Property

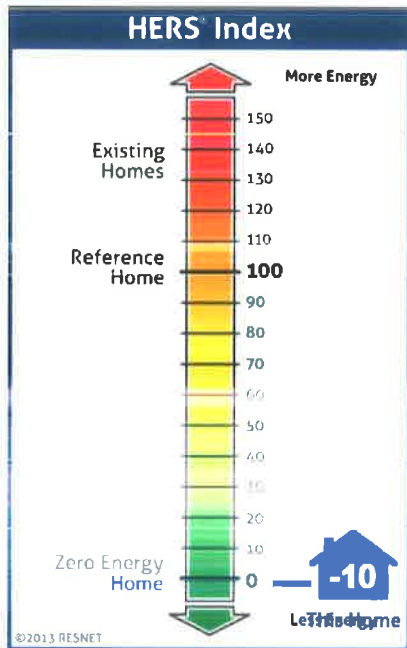
Builder: Rees-Larkin Development  
 Address:  
 Bldg A - Unit 1 Marcella St, Boston, MA

## Organization

Company:  
 Advanced Building Analysis, LLC  
 Phone: (978) 270-3911  
 Rater: Michael A Browne

## Energy Rating Index Information

Projected Rating  
 Rating No:  
 Rater ID (RTIN): 3992602  
 Date Rated: 1/26/2018



Estimated Annual Energy Consumption*		
	Rated Home Calculated Energy Use (MBtu)	Rated Home Cost (\$/yr)
Heating	3.5	\$175
Cooling	1.1	\$53
Water Heating	2.1	\$107
Lights & Appliances	15.9	\$791
Photovoltaics	-29.9	\$0
<b>Total</b>	<b>22.6</b>	<b>\$48</b>

\*Based on standard operating conditions

**ERI with PV: -10**

**ERI without PV: 31**

Electric (kWh): 6,626.5	CO2 Emissions (Tons): -1.4
Natural Gas (Therms): 0.0	Energy Savings (\$)**: N/A
**Based on the 2015 IECC R-406 Reference design home	

Maximum Energy Rating Index: 55

This Home's Energy Rating Index: -10

PASS

This home MEETS the Energy Rating Index Score requirement of 2015 IECC R-406 based on Climate Zone 5. In addition to the Energy Rating Index other mandatory measures must be met. (See Mandatory Requirements on second page.)

Name: Michael A Browne

Signature:

Organization: Advanced Building Analysis, LLC

Date: Feb 12, 2018

## Rating Provider Data and Seal

Company: Energy Raters of Massachusetts

Address:

Phone #:

Fax #:



To determine if a provider is properly accredited go to: [www.resnet.us/professional/programs/search\\_directory](http://www.resnet.us/professional/programs/search_directory)

(Projected. Confirmation required.)

Climate Zone 5 Mandatory Requirements		
Provision Number	Topic	Compliance Decision
2009 IECC Table 402.1.1 or 402.1.3	Building thermal envelope minimum insulation levels and maximum fenestration U-factor and SHGC	PASS
R401.3	Post a permanent certificate listing the level of efficiencies installed in the house	Certificate required for CO
R402.4	Envelope air leakage maximum leakage rate	(Climate Zone 5 ACH50) PASS
R402.4.1 / Table R402.4.1.1	Comply with air sealing and insulation requirements in Table R402.4.1.1	Checklist required for CO
R402.4.4	Rooms containing fuel-burning appliances	PASS*
R402.5	Maximum fenestration U-factor and SHGC	(U-Factor) PASS  (SHGC) PASS
R403.1.2	Heat pump controls	PASS*
R405.2	Ducts outside of conditioned space to be insulated to a minimum of R-6.	PASS*
R403.3.2	Duct sealing on all ducts	PASS*
R403.3.3	Duct testing for ducts in unconditioned space	PASS*
R403.3.5	Building cavities not used as ducts.	PASS*
R403.5.1	Heated water circulation and temperature maintenance systems comply	PASS*
R403.5.3	Hot water pipe insulated to R-3	PASS
R403.6	Mechanical ventilation meeting the requirements of the IRC or IMC. Outdoor air and exhaust dampers installed	PASS*
R403.7	ACCA Manual J and S conducted for all heating and cooling systems.	ACCA forms required for permit
R403.8	Systems serving multiple dwelling units to meet the mechanical requirements of the IECC commercial	PASS*
R403.9	Snow melt and ice system controls installed where applicable	PASS*
R403.10	Pools and permanent spa energy consumption meet requirements for heaters, time clocks and covers	PASS*
R403.11	Portable spas meet the requirements of APSP-14.	PASS*
R404.1	High efficacy lights installed in 75 % of permanently installed fixtures.	PASS

\* This is a projected rating. These Items must eventually be field-verified by the Rater or Field Inspector.

# IECC 2015 Performance Compliance



**Property**  
 Rees-Larkin Development  
 Bldg A - Unit 1 Marcella St  
 Boston, MA 02119

**Organization**  
 Advanced Building Analysis  
 (978) 270-3911  
 Michael A Browne

**Inspection Status**  
 Results are projected

Bldg A - Unit 1  
 E+ Marcella St, 2 A - 1

**Builder**  
 Rees-Larkin Development

## Annual Energy Cost

Design	IECC 2015 Performance	As Designed
Heating	\$638	\$165
Cooling	\$87	\$83
Water Heating	\$137	\$137
<b>SubTotal - Used to determine compliance</b>	<b>\$862</b>	<b>\$385</b>
Lights & Appliances	\$663	\$686
Onsite generation	\$0	\$0
<b>Total</b>	<b>\$1,526</b>	<b>\$1,071</b>

405.3 Performance-based passes by 55.3%	compliance	402.4.1.2 Air Leakage Testing	402.5 Area-weighted average fenestration SHGC
402.5 Area-weighted average fenestration SHGC		404	Mandatory Checklist

**Design exceeds requirements for IECC 2015 Performance compliance by 55.3%.**

Name: Michael A Browne  
 Organization: Advanced Building Analysis, LLC

Signature:   
 Date: Feb 12, 2018

# 2015 IECC Building UA Compliance



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(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

Bldg A - Unit 1  
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**Builder**  
Rees-Larkin Development

## Building UA


Elements	IECC Reference	As Designed
Ceilings	16.3	12.8
Above-Grade Walls	85.0	43.7
Windows, Doors and Skylights	184.2	100.5
Slab Floor:	34.1	16.7
Framed Floors	0.0	0.0
Basement Walls	0.0	0.0
Rim Joists	5.3	2.9
<b>Overall UA (Design must be equal or lower):</b>	<b>324.9</b>	<b>176.6</b>

## Mandatory Requirements

<b>402.1.5</b> Total UA alternative for insulation and fenestration	<b>402.4.1.2</b> Air Leakage Testing	<b>402.5</b> Area-weighted average fenestration SHGC
✓	✓	✓
<b>402.5</b> Area-weighted average fenestration U-Factor	<b>404</b> Lighting Equipment Efficiency	<b>Mandatory Checklist</b>
✓	✓	✓
<b>403.3.3</b> Duct Testing	<b>403.5.3</b> Hot water pipe insulation	
✓	✓	

**Design exceeds requirements for IECC 2015 Prescriptive compliance by 45.6%.**

Name: Michael A Browne  
Organization: Advanced Building Analysis, LLC

Signature:   
Date: Feb 12, 2018



# Air Leakage Report

**Property**

Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

**Organization**

Advanced Building Analysis  
(978) 270-3911  
Michael A Browne

**Inspection Status**

Results are projected

Bldg A - Unit 1

E+ Marcella St, 2 A - 1

**Builder**

Rees-Larkin Development

## Air Leakage

---

Measurement Unit	ACH at 50 Pa
Measured Infiltration	0.55
ACH50 (Calculated)	0.6
ELA [sq. in.] (Calculated)	8.8
CFM50 (Calculated)	160.2

## Duct Leakage

---

Number of Duct Systems	0 System(s)
Leakage to Outdoors [CFM @ 25 Pa]	N/A
Leakage to Outdoors [CFM25 / 100 s.f.]	N/A
Leakage to Outdoors [CFM25 / CFA]	N/A
Total Leakage Test Type	N/A
Total Leakage [CFM @ 25 Pa]	N/A
Total Leakage [CFM25 / 100 s.f.]	N/A
Total Leakage [CFM25 / CFA]	N/A

## Mechanical Ventilation

---

Rate [CFM]	85.0
Hours per day	24.0
Fan Watts	38.3
Recovery Efficiency %	85.0
Runs at least once every 3 hrs?	true
Average Rate [CFM]	85.0
2010 ASHRAE 62.2 Req. Cont. Ventilation	46.8

# HERS Emissions Comparison



**Property**  
 Rees-Larkin Development  
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 Boston, MA 02119

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 Advanced Building Analysis  
 (978) 270-3911  
 Michael A Browne

**Inspection Status**  
 Results are projected

Bldg A - Unit 1  
 E+ Marcella St, 2 A - 1

**Builder**  
 Rees-Larkin Development

Annual Carbon Dioxide (CO2) [tons/yr]	HERS Ref.	Rated Home	Savings	% Saved
Heating	5.5	0.7	4.9	88.1%
Cooling	0.3	0.2	0.1	40.4%
Water Heating	2.2	0.4	1.8	81.7%
Lights & Appliances	4.6	3.0	1.6	35.3%
Photovoltaics	-0.0	-5.6	5.6	
<b>TOTAL</b>	<b>12.7</b>	<b>-1.4</b>	<b>14.1</b>	<b>110.8%</b>

Annual Sulfur Dioxide (SO2) [lbs/yr]	HERS Ref.	Rated Home	Savings	% Saved
Heating	13.9	1.6	12.2	88.1%
Cooling	0.8	0.5	0.3	40.4%
Water Heating	5.5	1.0	4.5	81.7%
Lights & Appliances	11.5	7.4	4.1	35.3%
Photovoltaics	-0.0	-14.0	14.0	
<b>TOTAL</b>	<b>31.7</b>	<b>-3.4</b>	<b>35.1</b>	<b>110.8%</b>

Annual Nitrogen Oxide (NOx) [lbs/yr]	HERS Ref.	Rated Home	Savings	% Saved
Heating	7.8	0.9	6.9	88.1%
Cooling	0.5	0.3	0.2	40.4%
Water Heating	3.1	0.6	2.5	81.7%
Lights & Appliances	6.5	4.2	2.3	35.3%
Photovoltaics	-0.0	-7.9	7.9	
<b>TOTAL</b>	<b>17.8</b>	<b>-1.9</b>	<b>19.8</b>	<b>110.8%</b>

Ekotrope RATER - Version 2.2.4.1860  
 This information does not constitute a warranty or guarantee of home energy performance

# ENERGY STAR V3.1 Emissions Comparison



**Property**

Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

**Organization**

Advanced Building Analysis  
(978) 270-3911  
Michael A Browne

**Inspection Status**

Results are projected

Bldg A - Unit 1

E+ Marcella St, 2 A - 1

**Builder**

Rees-Larkin Development

Annual Carbon Dioxide (CO2) [tons/yr]	ES V3.1 Ref.	Rated Home	Savings	% Saved
Heating	2.6	0.7	1.9	74.5%
Cooling	0.2	0.2	-0.0	-5.9%
Water Heating	2.2	0.4	1.8	81.3%
Lights & Appliances	3.5	3.0	0.5	14%
Photovoltaics	-0.0	-5.6	5.6	
<b>TOTAL</b>	<b>8.4</b>	<b>-1.4</b>	<b>9.8</b>	<b>116.4%</b>

Annual Sulfur Dioxide (SO2) [lbs/yr]	ES V3.1 Ref.	Rated Home	Savings	% Saved
Heating	6.5	1.6	4.8	74.5%
Cooling	0.5	0.5	-0.0	-5.9%
Water Heating	5.4	1.0	4.4	81.3%
Lights & Appliances	8.7	7.4	1.2	14%
Photovoltaics	-0.0	-4.0	4.0	
<b>TOTAL</b>	<b>21.0</b>	<b>-3.4</b>	<b>24.4</b>	<b>116.4%</b>

Annual Nitrogen Oxide (NOx) [lbs/yr]	ES V3.1 Ref.	Rated Home	Savings	% Saved
Heating	3.6	0.9	2.7	74.5%
Cooling	0.3	0.3	-0.0	-5.9%
Water Heating	3.0	0.6	2.5	81.3%
Lights & Appliances	4.9	4.2	0.7	14%
Photovoltaics	-0.0	-7.9	7.9	
<b>TOTAL</b>	<b>11.8</b>	<b>-1.9</b>	<b>13.7</b>	<b>116.4%</b>

Ekotrope RATER - Version 2.2.4.1860

This information does not constitute a warranty or guarantee of home energy performance

Marcella Street 2A-1

# IECC 2015 Emissions Comparison



**Property**  
 Rees-Larkin Development  
 Bldg A - Unit 1 Marcella St  
 Boston, MA 02119

**Organization**  
 Advanced Building Analysis  
 (978) 270-3911  
 Michael A Browne

**Inspection Status**  
 Results are projected

Bldg A - Unit 1  
 E+ Marcella St, 2 A - 1

**Builder**  
 Rees-Larkin Development

Annual Carbon Dioxide (CO2) [tons/yr]	2015 IECC	Rated Home	Savings	% Saved
Heating	2.8	0.7	2.1	74.1%
Cooling	0.4	0.4	0.0	5%
Water Heating	0.6	0.6	0.0	0%
Lights & Appliances	2.9	3.0	-0.1	-3.3%
Photovoltaics	-0.0	-0.0	0.0	0%
<b>TOTAL</b>	<b>6.6</b>	<b>4.7</b>	<b>2.0</b>	<b>29.8%</b>

Annual Sulfur Dioxide (SO2) [lbs/yr]	2015 IECC	Rated Home	Savings	% Saved
Heating	6.9	1.8	5.1	74.1%
Cooling	0.9	0.9	0.0	5%
Water Heating	1.5	1.5	0.0	0%
Lights & Appliances	7.2	7.4	-0.2	-3.3%
Photovoltaics	-0.0	-0.0	0.0	0%
<b>TOTAL</b>	<b>16.6</b>	<b>11.6</b>	<b>4.9</b>	<b>29.8%</b>

Annual Nitrogen Oxide (NOx) [lbs/yr]	2015 IECC	Rated Home	Savings	% Saved
Heating	3.9	1.0	2.9	74.1%
Cooling	0.5	0.5	0.0	5%
Water Heating	0.8	0.8	0.0	0%
Lights & Appliances	4.1	4.2	-0.1	-3.3%
Photovoltaics	-0.0	-0.0	0.0	0%
<b>TOTAL</b>	<b>9.3</b>	<b>6.5</b>	<b>2.8</b>	<b>29.8%</b>

Ekotrope RATER - Version 2.2.4.1860  
 This information does not constitute a warranty or guarantee of home energy performance

# Fuel Summary



**Property**  
 Rees-Larkin Development  
 Bldg A - Unit 1 Marcella St  
 Boston, MA 02119

**Organization**  
 Advanced Building Analysis, I  
 (978) 270-3911  
 Michael A Browne

**Inspection Status**  
 Results are projected

Bldg A - Unit 1  
 E+ Marcella St, 2 A - 1

**Builder**  
 Rees-Larkin Development

## Annual Energy Cost

Electric	\$48
----------	------

## Annual End-Use Cost

Heating	\$175
Cooling	\$53
Water Heating	\$107
Lights & Appliances	\$791
Onsite Generation	-\$1,127
Service Charges	\$48
<b>Total</b>	<b>\$48</b>

## Annual End-Use Consumption

Heating [Electric kWh]	1,032.1
Cooling [Electric kWh]	313.9
Hot Water [Electric kWh]	623.4
Lights & Appliances [Electric kWh]	4,658.8
Total [Electric kWh]	6,633.2
Total Onsite Generation kWh	8,782.6

## Peak Electric Consumption

Peak Winter kW	1.34
Peak Summer kW	1.08

## Utility Rates

Electricity	MA Average Electric '15 to '17
Natural Gas	2006-2016_Ave Gas_MA

# HERS Fuel Summary Comparison



**Property**  
Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

**Organization**  
Advanced Building Analysis, I  
(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

Bldg A - Unit 1  
E+ Marcella St, 2 A - 1

**Builder**  
Rees-Larkin Development

Annual Energy Cost [\$ /yr]	HERS Ref.	Rated Home	Savings	% Saved
Electric	\$3,417	\$48	\$3,369	98.6%

Annual End-Use Cost [\$ /yr]	HERS Ref.	Rated Home	Savings	% Saved
Heating	\$1,473	\$175	\$1,298	88.1%
Cooling	\$89	\$53	\$36	40.3%
Water Heating	\$584	\$107	\$477	81.7%
Lights & Appliances	\$1,223	\$791	\$432	35.3%
Onsite Generation	-\$0	-\$1,127	\$1,127	
Service Charges	\$48	\$48	\$0	0%
<b>Total</b>	<b>\$3,417</b>	<b>\$48</b>	<b>\$3,369</b>	<b>98.6%</b>

Annual End-Use Consumption	HERS Ref.	Rated Home	Savings	% Saved
Heating [Electric kWh]	8,673.9	1,032.1	7,641.8	88.1%
Cooling [Electric kWh]	526.5	313.9	212.5	40.4%
Hot Water [Electric kWh]	3,438.1	628.4	2,809.7	81.7%
Lights & Appliances [Electric kWh]	7,200.5	4,658.8	2,541.7	35.3%
<b>Total [Electric kWh]</b>	<b>19,839.0</b>	<b>6,633.2</b>	<b>13,205.8</b>	<b>66.6%</b>
Total Onsite Generation kWh	0.0	8,782.6	-8,782.6	

Peak Electric Consumption	HERS Ref.	Rated Home	Savings	% Saved
Peak Winter kW	5.11	1.34	3.77	73.7%
Peak Summer kW	2.03	1.08	0.95	46.9%

## Utility Rates

Electricity	MA Average Electric'15 to '17
Natural Gas	2006-2016_Ave Gas_MA

# ENERGY STAR V3.1 Fuel Summary Comparison



**Property**  
Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

**Organization**  
Advanced Building Analysis, I  
(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

Bldg A - Unit 1  
E+ Marcella St, 2 A - 1

**Builder**  
Rees-Larkin Development

Annual Energy Cost [\$ /yr]	ES V3.1 Ref.	Rated Home	Savings	% Saved
Electric	\$2,279	\$48	\$2,231	97.9%

Annual End-Use Cost [\$ /yr]	ES V3.1 Ref.	Rated Home	Savings	% Saved
Heating	\$689	\$175	\$514	74.6%
Cooling	\$50	\$53	-\$3	-6%
Water Heating	\$572	\$107	\$465	81.3%
Lights & Appliances	\$920	\$791	\$129	14%
Onsite Generation	-\$0	-\$1,127	\$1,127	
Service Charges	\$48	\$48	\$0	0%
<b>Total</b>	<b>\$2,279</b>	<b>\$48</b>	<b>\$2,231</b>	<b>97.9%</b>

Annual End-Use Consumption	ES V3.1 Ref.	Rated Home	Savings	% Saved
Heating [Electric kWh]	4,054.5	1,032.1	3,022.4	74.5%
Cooling [Electric kWh]	296.6	313.9	-17.4	-5.9%
Hot Water [Electric kWh]	6,367.5	8,254	2,739.5	43%
Lights & Appliances [Electric kWh]	6,417.7	4,658.8	758.9	14%
Total [Electric kWh]	13,136.2	6,633.2	6,503.0	49.5%
Total Onsite Generation kWh	0.0	8,782.6	-8,782.6	

Peak Electric Consumption	ES V3.1 Ref.	Rated Home	Savings	% Saved
Peak Winter kW	3.11	1.34	1.77	56.8%
Peak Summer kW	1.58	1.08	0.50	31.7%

## Utility Rates

Electricity	MA Average Electric '15 to '17
Natural Gas	2006-2016_Ave Gas_MA

# IECC 2015 Fuel Summary Comparison



**Property**  
Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

**Organization**  
Advanced Building Analysis, I  
(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

Bldg A - Unit 1  
E+ Marcella St, 2 A - 1

**Builder**  
Rees-Larkin Development

Annual Energy Cost [\$ /yr]	2015 IECC	Rated Home	Savings	% Saved
Electric	\$1,526	\$1,071	\$455	29.8%

Annual End-Use Cost [\$ /yr]	2015 IECC	Rated Home	Savings	% Saved
Heating	\$638	\$165	\$473	74.2%
Cooling	\$87	\$83	\$4	4.6%
Water Heating	\$137	\$137	\$0	0%
Lights & Appliances	\$663	\$686	-\$23	-3.5%
Onsite Generation	-\$0	-\$0	\$0	0%
Service Charges	\$0	\$0	\$0	0%
Total	\$1,526	\$1,071	\$455	29.8%

Annual End-Use Consumption	2015 IECC	Rated Home	Savings	% Saved
Heating [Electric kWh]	4,334.4	1,121.4	3,213.0	74.1%
Cooling [Electric kWh]	594.3	564.8	29.5	5%
Hot Water [Electric kWh]	932.6	932.6	0.0	0%
Lights & Appliances [Electric kWh]	4,508.2	4,658.8	-150.6	-3.3%
Total [Electric kWh]	10,369.5	7,277.5	3,092.0	29.8%
Total Onsite Generation kWh	0.0	0.0	0.0	0%

Peak Electric Consumption	2015 IECC	Rated Home	Savings	% Saved
Peak Winter kW	2.42	1.43	0.99	41.1%
Peak Summer kW	1.26	1.30	-0.04	-3.3%

## Utility Rates

Electricity	MA Average Electric'15 to '17
Natural Gas	2006-2016_Ave Gas_MA



# Building Summary



**Property**  
 Rees-Larkin Development  
 Bldg A - Unit 1 Marcella St  
 Boston, MA 02119

**Organization**  
 Advanced Building Analysis LLC  
 (978) 270-3911  
 Michael A Browne

**Inspection Status**  
 Results are projected

Bldg A - Unit 1  
 E+ Marcella St, 2A - 1

**Builder**  
 Rees-Larkin Development

## General Building Information

Number Of Bedrooms	3
Number Of Floors	3
Conditioned Floor Area [sq. ft.]	1,684
Unconditioned attached garage?	No
Conditioned Volume [cu. ft.]	17,477
Number Of Units	1
Residence Type	Townhouse, end unit
Model	Left end townhouse, 3 bdrm
Community	Marcella Highlands E+ Package

## Basement Wall

None Present

## Basement Wall Library List

None Present

## Slab

Name	Library Type	Perimeter	Floor Grade	Carpet R	Exposed Masonry Area	Surface Area	Location	Enclosing
Slab On Grade	R20	71	On Grade	1.23	0	621.0 sq. ft.	Exposed Exterior	Conditioned Space

## Slab Library List

Name	Wall Construction Type	Slab Completely Insulated?	Underslab Insulation Width [ft]	Perimeter Insulation Depth [ft]	Perimeter Insulation R Value	R
R20	Wood Frame / Other	Yes	99	0.5	20	20

## Framed Floor

None Present

# Building Summary



**Property**  
 Rees-Larkin Development  
 Bldg A - Unit 1 Marcella St  
 Boston, MA 02119

**Organization**  
 Advanced Building Analysis, LLC  
 (978) 270-3911  
 Michael A Browne

**Inspection Status**  
 Results are projected

Bldg A - Unit 1  
 E+ Marcella St, 2 A - 1

**Builder**  
 Rees-Larkin Development

## Framed Floor Library List

None Present

## Rim Joist

Name	Library Type	Surface Area	Location
Band/Cond	R 0.0	64.0 sq. ft.	Conditioned Space (Adiabatic)
Band/Ext	R 35.0	115.0 sq. ft.	Exposed Exterior

## Rim Joist Library List

Name	R
R 0.0	0
R 35.0	35

## Wall

Name	Library Type	Surface Color	Surface Area	Location
Adiabatic	R11,FG3,4-16	Medium	932.0 sq. ft.	Conditioned Space (Adiabatic)
Exterior	R23ocf,6-24,+ZipR12	Medium	1,992.0 sq. ft.	Exposed Exterior

## Wall Library List

Name	R
R11,FG3,4-16	9 92919
R23ocf,6-24,+ZipR12	32 39182

# Building Summary



**Property**  
Rees-Larkin Development  
Bldg A - Unit 1 Marcella St.  
Boston, MA 02119

**Organization**  
Advanced Building Analysis LLC  
(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

Bldg A - Unit 1  
E+ Marcella St. 2 A-1

**Builder**  
Rees-Larkin Development

## Glazing

Name	Library Type	Wall Assignment	Basement Wall Assignment	Overhang Depth	Overhang Ft To Top	Overhang Ft To Bottom	Orientation	Surface Area
Northeast ax3	U-0.17, SHGC-0.30	Exterior		0	0	0	Northwest	56.0 sq. ft.
Northeast b	U-0.17, SHGC-0.30	Exterior		0	0	0	Northeast	40.0 sq. ft.
Northeast c	U-0.17, SHGC-0.30	Exterior		0	0	0	Northeast	56.0 sq. ft.
Northwest ax8	U-0.17, SHGC-0.30	Exterior		0	0	0	Northwest	150.0 sq. ft.
Southwest b	U-0.17, SHGC-0.30	Exterior		4.4	14	20	Southwest	40.0 sq. ft.
Southwest c	U-0.17, SHGC-0.30	Exterior		4.4	24	30	Southwest	40.0 sq. ft.
Southwest d	U-0.17, SHGC-0.30	Exterior		13	4.7	12.7	Southwest	53.3 sq. ft.
Southwest e	U-0.17, SHGC-0.30	Exterior		13	3.7	9.7	Southwest	53.3 sq. ft.
Southwest f	U-0.17, SHGC-0.30	Exterior		4.4	18	19	Southwest	50.0 sq. ft.
Southwest g	U-0.17, SHGC-0.30	Exterior		0	0	0	Southwest	57.0 sq. ft.

## Glazing Library List

Name	Shgc	R
U-0.17, SHGC-0.30	0.3	5.66265

## Skylight

None Present

## Skylight Library List

None Present

# Building Summary



**Property**  
Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

**Organization**  
Advanced Building Analysis, LLC  
(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

Bldg A - Unit 1  
E+ Marcella St, 2 A - 1

**Builder**  
Rees-Larkin Development

## Opaque Door

Name	Library Type	Wall Assignment	Basement Wall Assignment	Emittance	Solar Absorptance	Surface Color	Surface Area	Location
Opaque Door	Door R-3	Exterior		0.9	0.75	Medium	16.7 sq ft	Exposed Exterior

## Opaque Door Library List

Name	R
Door R-3	3.0303

## Roof Insulation

Name	Library Type	Roof-Deck Area [sq. ft.]	Clay or Concrete Roof Tiles	Surface Color	Surface Area	Location
Ceiling R38ocf,10-16,+R16 EPS		625	No	Reflective	625.0 sq ft.	Vaulted Roof

## Roof Insulation Library List

Name	Has Radiant Barrier	R
R38ocf,10-16,+R16 EPS	No	48.73357

## Whole House Infiltration

Infiltration	Measurement Type	Shelter Class
0.55 ACH at 50 Pa	Blower-door tested	4

## Mechanical Ventilation

Ventilation Type	Ventilation Rate [Cubic Feet /Minute]	Operational hours per day	Fan Watts	Runs <b>once</b> every three hours	Energy Recovery Percent
ERV	85	24	38.25	Yes	85

# Building Summary



**Property**  
 Rees-Larkin Development  
 Bldg A - Unit 1 Marcella St  
 Boston, MA 02119

**Organization**  
 Advanced Building Analysis LLC  
 (978) 270-3911  
 Michael A Browne

**Inspection Status**  
 Results are projected

Bldg A - Unit 1  
 E+ Marcella St. 2 A - 1

**Builder**  
 Rees-Larkin Development

## Lighting

% Interior Efficient Lighting	% Exterior Efficient Lighting	% Garage Efficient Lighting
100	100	100

## Onsite Generation

None Present

## Onsite Generation Library List

None Present

## Solar Generation

Name	Library Type	\$/kWh from Utility
Unnamed Solar Generation	7.10 kW Southeast/Southwest	0

## Solar Generation Library List

Name	Track Mode	Nameplate Capacity (kWdc)	Derate Factor	Orientation (deg)	Tilt (deg)
7.10 kW. Southeast/Southwest	Fixed	7.1 kW	0.85	148°	8°

## Conditioning Equipment

Name	Library Type	Heating Percent Load	Cooling Percent Load	Hot Water Percent Load
Air-source heat pump (1)	MXZ-3C24NAHZ-GS Ductless	100%	100%	0%
Water Heating (2)	State HPX-50-D-HPT 12	0%	0%	100%

# Building Summary



**Property**  
Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

**Organization**  
Advanced Building Analysis, LLC  
(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

Bldg A - Unit 1  
E+ Marcella St, 2 A - 1

**Builder**  
Rees-Larkin Development

## Equipment Type: MXZ-3C24NAHZ-GS, Ductless

<b>Fuel Type</b>	Electric
<b>Distribution Type</b>	Forced Air Ductless
<b>Motor Type</b>	Variable Speed (ECM)
<b>Heating Efficiency</b>	2.93255 COP
<b>Heating Capacity [kBtu/h]</b>	14
<b>Cooling Efficiency</b>	19 SEER
<b>Cooling Capacity [kBtu/h]</b>	22

## Equipment Type: State HPX-50-DHPT 12

<b>Fuel Type</b>	Electric
<b>Distribution Type</b>	Hydronic Delivery
<b>Hot Water Efficiency</b>	3.24 Energy Factor
<b>Tank Capacity (gal.)</b>	50

## Distribution System

<b>Distribution Type</b>	Forced Air Ductless
<b>Heating Equipment</b>	Air-source heat pump (1)
<b>Cooling Equipment</b>	Air-source heat pump (1)
<b>Is All Equipment In Conditioned Space</b>	Yes
<b>Leakage Default</b>	HERS Default Leakage
<b>Duct System Efficiency</b>	1

## Ceiling Fan

<b>Has Ceiling Fan</b>	No
<b>Cfm Per Watt</b>	100

## Water Distribution

<b>Water Fixture Type</b>	Low-flow
<b>Use Default Hot Water Pipe Length</b>	No
<b>Hot Water Pipe Length [ft]</b>	32
<b>At Least R3 Pipe Insulation?</b>	Yes
<b>Hot Water Recirculation System?</b>	No
<b>Recirculation System Pipe Loop Length [ft]</b>	0
<b>Drain Water Heat Recovery?</b>	No

## Clothes Dryer

<b>Fuel Type</b>	Electric
<b>Cef</b>	4
<b>Field Utilization</b>	Moisture Sensing

# Building Summary



**Property**  
Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

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Advanced Building Analysis, LLC  
(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

Bldg A - Unit 1  
E+ Marcella St, 2 A - 1

**Builder**  
Rees-Larkin Development

## Clothes Washer

Label Energy Rating	96 kWh/Year
Electric Rate	\$0.11/kWh
Annual Gas Cost	\$11.00
Gas Rate	\$1.22/Therm
Capacity	3.81
Imef	3.06

## Kitchen Appliances

Dishwasher Size	Standard
Dishwasher kWh / yr	270
Range Oven Fuel	Electric
Convection Oven?	No
Induction Range?	No
Refrigerator Consumption	500 kWh/Year

## Notes

# Tax Credit Reference Home Summary



**Property**  
Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

**Organization**  
Advanced Building Analysis, LLC  
(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

IECC 2006 Reference House  
E+ Marcella St, 2 A - 1

**Builder**  
Rees-Larkin Development

## General Building Information

Number Of Bedrooms	3
Number Of Floors	3
Conditioned Floor Area [sq. ft.]	1,684
Unconditioned, attached garage?	No
Conditioned Volume [cu. ft.]	17,477
Number Of Units	1
Residence Type	Townhouse, end unit
Model	Left end townhouse, 3 bdrm
Community	Marcella Highlands E+ Package

## Basement Wall

None Present

## Basement Wall Library List

None Present

## Slab

Name	Library Type	Perimeter	Floor Grade	Carpet R	Exposed Masonry Area	Surface Area	Location	Enclosing
Slab On Grade	IECC Reference	71	On Grade	2	124.2	621 0 sq ft	Exposed Exterior	Conditioned Space

## Slab Library List

Name	Wall Construction Type	Slab Completely Insulated?	Underslab Insulation Width [ft]	Perimeter Insulation Depth [ft]	Perimeter Insulation R Value	R
IECC Reference	Wood Frame / Other	No	0	2	10	0

## Framed Floor

None Present



# Tax Credit Reference Home Summary



**Property**  
 Rees-Larkin Development  
 Bldg A - Unit 1 Marcella St  
 Boston MA 02119

**Organization**  
 Advanced Building Analysis LLC  
 (978) 270-3911  
 Michael A Browne

**Inspection Status**  
 Results are projected

IECC 2006 Reference House  
 E+ Marcella St, 2 A - 1

**Builder**  
 Rees-Larkin Development

## Framed Floor Library List

None Present

## Rim Joist

Name	Library Type	Surface Area	Location
Band/Cond	IECC Reference	64.0 sq ft	Conditioned Space (Adiabatic)
Band/Ext	IECC Reference	115.0 sq ft	Exposed Exterior

## Rim Joist Library List

Name	R
IECC Reference	166667
IECC Reference	166667

## Wall

Name	Library Type	Surface Color	Surface Area	Location
Adiabatic	IECC Reference	Medium	932.0 sq ft	Conditioned Space (Adiabatic)
Exterior	IECC Reference	Medium	1992.0 sq ft	Exposed Exterior

## Wall Library List

Name	R
IECC Reference	166667
IECC Reference	166667

# Tax Credit Reference Home Summary



**Property**  
Rees-Larkin Development  
Bldg A - Unit 1 Marcella St  
Boston, MA 02119

**Organization**  
Advanced Building Analysis, LLC  
(978) 270-3911  
Michael A Browne

**Inspection Status**  
Results are projected

IECC 2006 Reference House  
E+ Marcella St, 2 A - 1

**Builder**  
Rees-Larkin Development

## Glazing

Name	Library Type	Wall Assignment	Basement Wall Assignment	Overhang Depth	Overhang Ft To Top	Overhang Ft To Bottom	Orientation	Surface Area
NORTH Window/Glass Door	IECC Reference			0	0	0	North	53.3 sq. ft.
NORTH Window/Glass Door	IECC Reference			0	0	0	East	53.3 sq. ft.
NORTH Window/Glass Door	IECC Reference			0	0	0	West	53.3 sq. ft.
NORTH Window/Glass Door	IECC Reference			0	0	0	South	53.3 sq. ft.

## Glazing Library List

Name	Shgc	R
IECC Reference	0.4	2.85714

## Skylight

None Present

## Skylight Library List

None Present

## Opaque Door

Name	Library Type	Wall Assignment	Basement Wall Assignment	Emittance	Solar Absorptance	Surface Color	Surface Area	Location
Opaque Door	IECC Reference			0.9	0.75	Medium	40.0 sq. ft.	Exposed Exterior

## Opaque Door Library List

Name	R
IECC Reference	2.85714

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## Roof Insulation

Name	Library Type	Roof-Deck Area [sq. ft.]	Clay or Concrete Roof Tiles	Surface Color	Surface Area	Location
Ceiling	IECC Reference	625	No	Medium	625.0 sq. ft.	Vaulted Roof

## Roof Insulation Library List

Name	Has Radiant Barrier	R
IECC Reference	No	33 33333

## Whole House Infiltration

Infiltration	Measurement Type	Sealer Class
1.0000000000	1.0000000000	-

## Mechanical Ventilation

Ventilation Type	Ventilation Rate [Cubic Feet /Minute]	Operational hours per day	Fan Watts	Runs once every three hours	Energy Recovery Percent
ERV	0	24	21 078	Yes	85

## Lighting

% Interior Efficient Lighting	% Exterior Efficient Lighting	% Garage Efficient Lighting
100	100	100

## Onsite Generation

None Present

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## Onsite Generation Library List

None Present

## Solar Generation

None Present

## Solar Generation Library List

None Present

## Conditioning Equipment

Name	Library Type	Heating Percent Load	Cooling Percent Load	Hot Water Percent Load
Air-source heat pump (1)	Reference	100%	100%	0%
Water Heating (2)	Reference	0%	0%	100%

## Equipment Type: Reference

Fuel Type: Electric  
 Distribution Type: Forced Air Ductless  
 Motor Type: Variable Speed (ECM)  
 Heating Efficiency: 7.7 HSPF  
 Heating Capacity [kBtu/h]: 25.3  
 Cooling Efficiency: 13 SEER  
 Cooling Capacity [kBtu/h]: 12.3

## Equipment Type: Reference

Fuel Type: Electric  
 Distribution Type: Hydronic Delivery  
 Hot Water Efficiency: 0.97 Energy Factor  
 Tank Capacity (gal): 50

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## Distribution System

Distribution Type	Forced Air Ductless
Heating Equipment	Air-source heat pump (1)
Cooling Equipment	Air-source heat pump (1)
Is All Equipment In Conditioned Space	Yes
Leakage Default	HERS Default Leakage
Duct System Efficiency	0.8

## Ceiling Fan

Has Ceiling Fan	No
Cfm Per Watt	100

## Water Distribution

Water Fixture Type	Low-flow
Use Default Hot Water Pipe Length	No
Hot Water Pipe Length [ft]	32
At Least R3 Pipe Insulation?	Yes
Hot Water Recirculation System?	No
Recirculation System Pipe Loop Length [ft]	0
Drain Water Heat Recovery?	No

## Clothes Dryer

Fuel Type	Electric
Cef	4
Field Utilization	Moisture Sensing

## Clothes Washer

Label Energy Rating	96 kWh/Year
Electric Rate	\$0.11/kWh
Annual Gas Cost	\$11.00
Gas Rate	\$1.22/Therm
Capacity	3.81
Imef	3.05

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## Kitchen Appliances

Dishwasher Size	Standard
Dishwasher kWh / yr	270
Range/Oven Fuel	Electric
Convection Oven?	No
Induction Range?	No
Refrigerator Consumption	500 kWh/Year

## Notes

# End Use Energy Costs

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Michael A Browne

**Inspection Status**

Results are projected

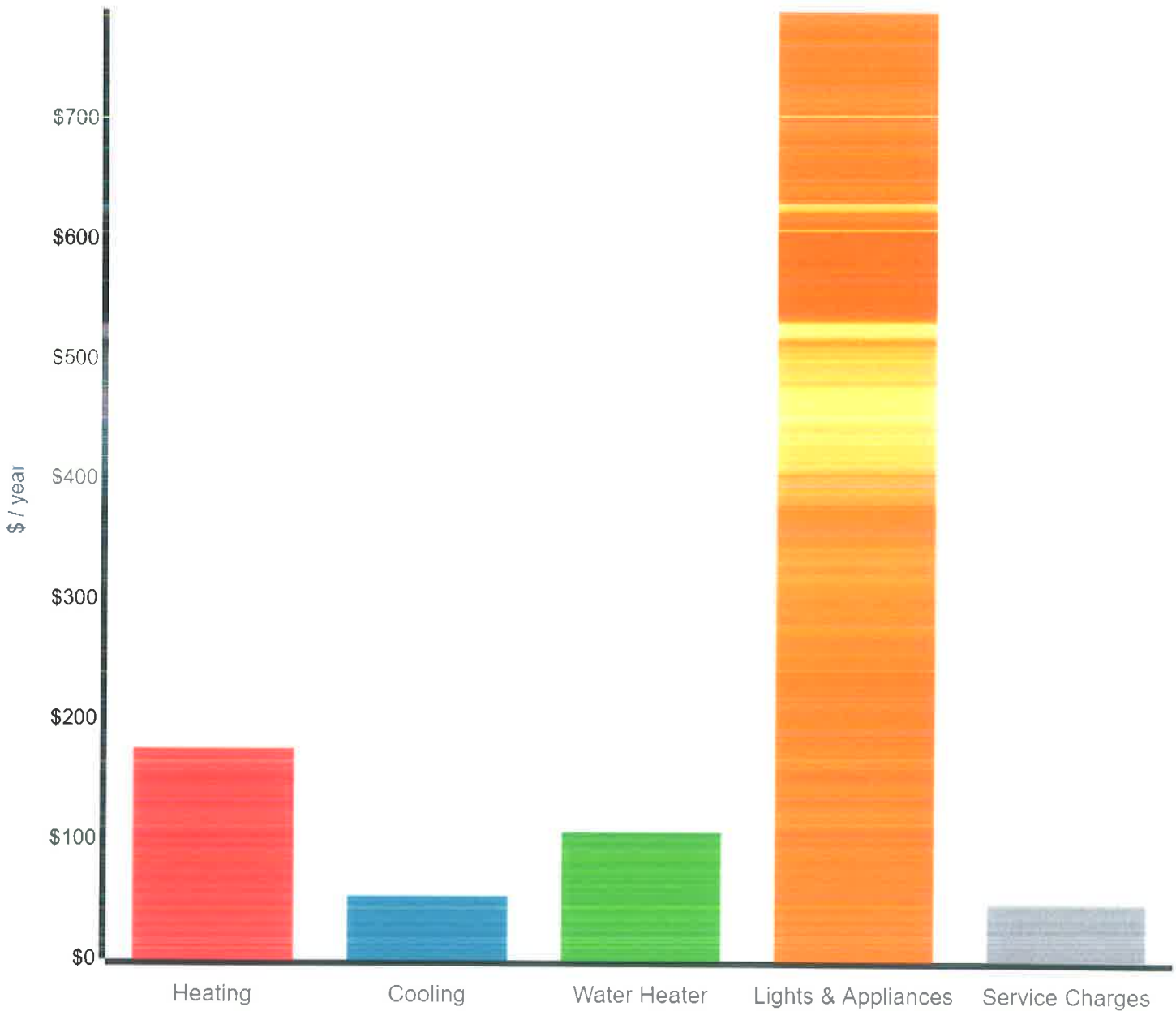
Bldg A - Unit 1

E+ Marcella St, 2 A - 1

**Builder**

Rees-Larkin Development

## Annual Energy Cost



Ekotrope RATER - Version 2.2.4.1860

This information does not constitute a warranty or guarantee of home energy performance

Marcella Street 2A-1

# Component Loads



**Property**  
 Rees-Larkin Development  
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 Boston, MA 02119

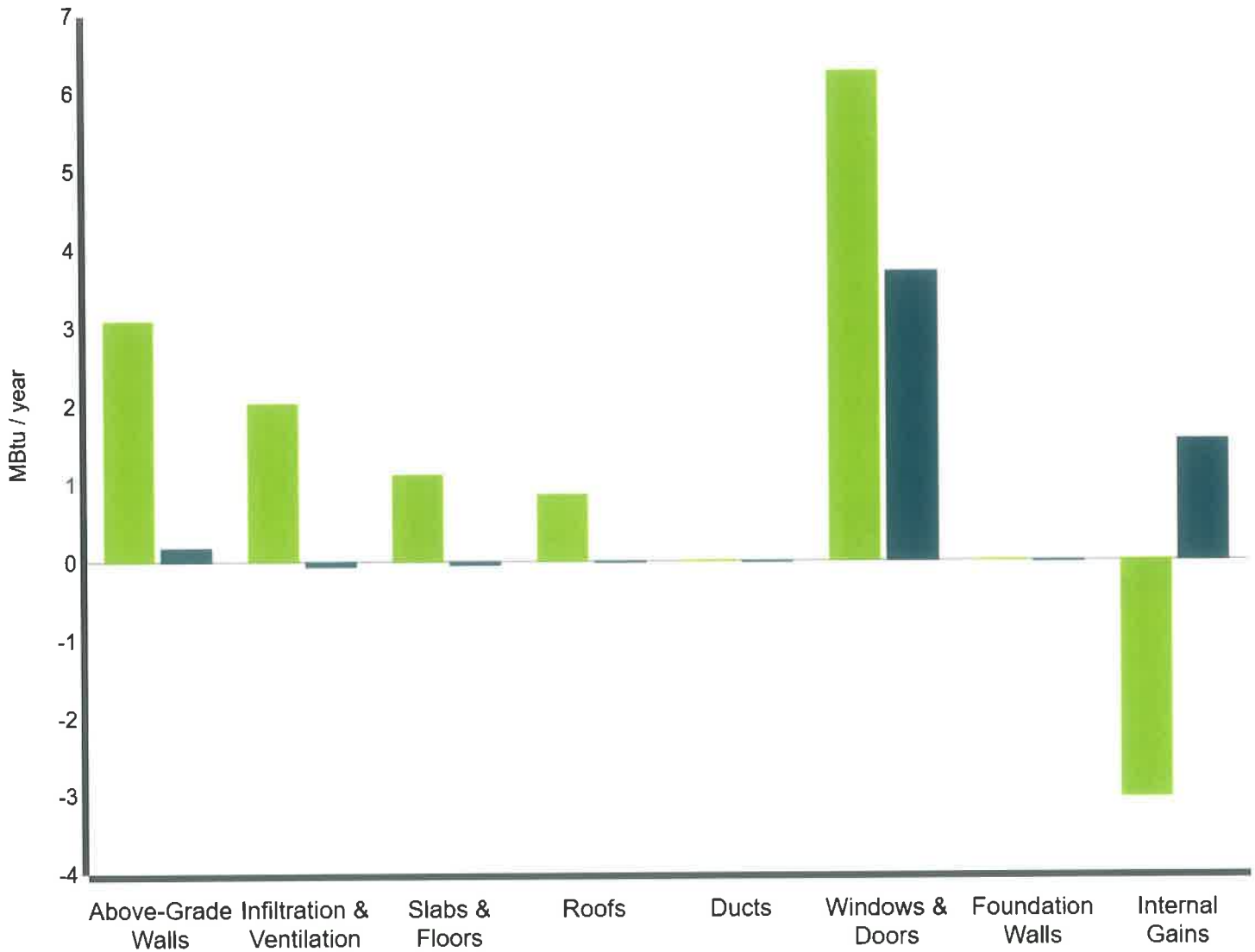
**Organization**  
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 (978) 270-3911  
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**Inspection Status**  
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Bldg A - Unit 1  
 E+ Marcella St, 2 A - 1

**Builder**  
 Rees-Larkin Development

## Heating & Cooling Loads



Heating ■

Cooling ■

Ekotrope RATER - Version 2.2.4.1860  
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Marcella Street 2A-1

REES-LARKIN DEVELOPMENT



# Component Costs



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**Organization**

Advanced Building Analysis  
 (978) 270-3911  
 Michael A Browne

**Inspection Status**

Results are projected

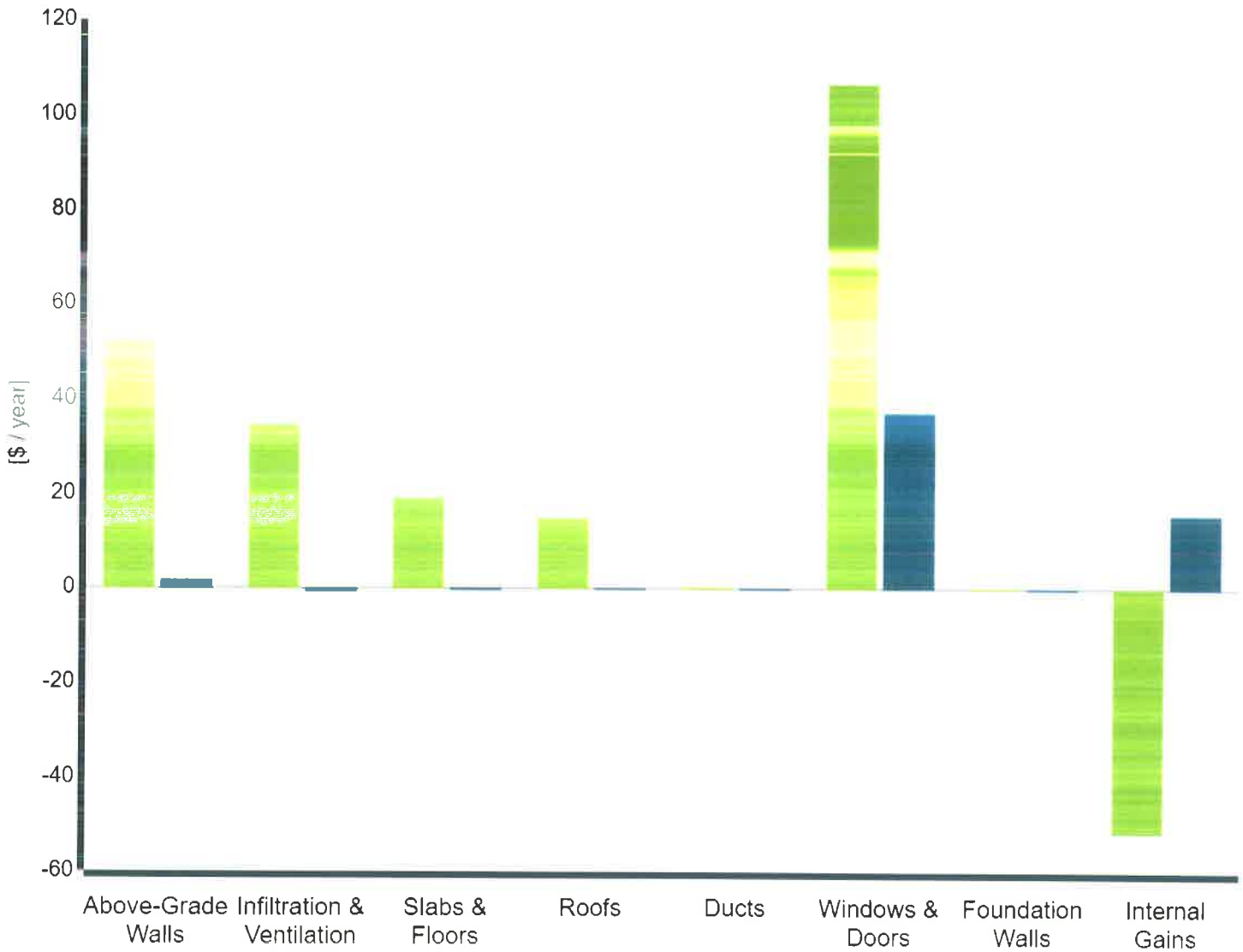
Bldg A - Unit 1

E+ Marcella St, 2 A - 1

**Builder**

Rees-Larkin Development

## Heating & Cooling Costs



Heating ■

Cooling ■

Ekotrope RATER - Version 2.2.4.1860

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Marcella Street 2A-1

# Home Energy Rating Certificate

## Projected Report

Rating Date: 1/26/2018  
 Registry ID: Unregistered  
 Rating Number:



**HERS® Index Score:**  
**-10**  
 Your home's HERS score is a relative performance score. The lower the number, the more energy efficient the home. To learn more, visit

**Annual Savings**  
**\$3,848**  
 \*Relative to an average U.S. home

**Home:** Bldg A - Unit 2 Marcella St, Boston, MA  
**Builder:** Rees-Larkin Development

### Your Home's Estimated Energy Use:

Use [MBtu]	Annual Cost
Heating	\$75
Cooling	\$41
Hot Water	\$107
Lights/Appliances	\$791
Service Charges	\$48
Generation (e.g. Solar)	-\$1,014
<b>Total:</b>	<b>\$48</b>

### This home meets or exceeds the criteria of the following:

- Energy Star v3
- Energy Star v3.1
- 2006 International Energy Conservation Code
- 2009 International Energy Conservation Code
- 2012 International Energy Conservation Code
- 2015 International Energy Conservation Code

### Home Feature Summary:

Home Type: Townhouse, end unit  
 Conditioned Floor Area: 1,684 sq. ft.  
 Number of Bedrooms: 3  
 Primary Heating System: Air Source Heat Pump • Electric • 2.93255 COP  
 Primary Cooling System: Air Source Heat Pump • Electric • 1.9 SEER  
 Primary Water Heating: Water Heater • Electric • 3.24 Energy Factor  
 House Tightness: 0.55 ACH50  
 Duct Leakage to Outside: 0 CFM25  
 Above Grade Walls: R-35  
 Ceiling: Vaulted Roof, R-54  
 Window Type: U-Value: 0.170, SHGC: 0.300  
 Foundation Walls: N/A

### Rating Completed by:

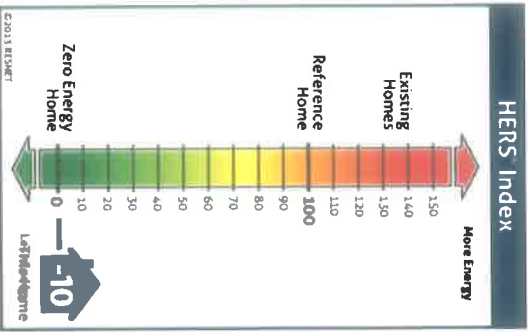
Energy Rater: Michael A Browne  
 RESNET ID: 3992602

Rating Company: Advanced Building Analysis, LLC  
 2 Woodlawn St, Amesbury, MA 01913  
 (978) 270-3911

Rating Provider: Energy Raters of Massachusetts



Michael A Browne, Certified Energy Rater



Ekotrope RATER - Version: 2.2.4.1860  
 The Home Energy Rating Standard Disclosure for this house is available from the rating provider.  
 This report does not constitute any warranty or guarantee.

# ENERGY STAR V3.1 Home Report



## Property

Rees-Larkin Development  
Bldg A - Unit 2 Marcella St  
Boston, MA 02119

## Organization

Advanced Building Analysis  
(978) 270-3911  
Michael A Browne

## Inspection Status

Results are projected

Bldg A - Unit 2

E+ Marcella St, 2 A - 2

## Builder

Rees-Larkin Development

## Mandatory Requirements

- ✓ Duct leakage at post construction better than or equal to ENERGY STAR v3/3.1 requirements.
- ✓ Envelope insulation levels meet or exceed ENERGY STAR v3/3.1 requirements.
- ✓ Slab on Grade Insulation must be > R-5, and at IECC 2009 Depth for Climate Zones 4 and above.
- ✓ Envelope insulation achieves RESNET Grade I installation, or Grade II with insulated sheathing.
- ✓ Windows meet the 2009 IECC Requirements - Table 402.1.1.
- ✓ Duct insulation meets the EPA minimum requirements of R-6.
- ✓ Mechanical ventilation system is installed in the home.
- ✓ ENERGY STAR Checklists fully verified and complete.

## HERS Index Target

Reference Home HERS	64
SAF (Size Adjustment Factor)	1.00
SAF Adjusted HERS Target	<u>64</u>
As Designed Home HERS	-10
As Designed Home HERS w/o PV	32

## Normalized, Modified End-Use Loads (MBtu / year)

	ENERGY STAR	As Designed
Heating	29.4	2.2
Cooling	2.4	2.4
Water Heating	10.1	1.9
Lights and Appliances	18.5	15.9
Total	45.5	22.4



This home **MEETS** or **EXCEEDS** the energy efficiency requirements for designation as an EPA ENERGY STAR Qualified Home under Version 3.1

## Pollution Prevented

Type of Emissions	Reduction
Carbon Dioxide (CO2) - tons/yr	13.5

## Energy Cost Savings

	\$/yr
Heating	339
Cooling	0
Water Heating	465
Lights & Appliances	129
Generation Savings	1,014
Total	1,947

The energy savings and pollution prevented are calculated by comparing the Rated Home to the ENERGY STAR Version 3.1 Reference Home as defined in the ENERGY STAR Qualified Homes HERS Index Target Procedure for National Program Requirements, Version 3.1 promulgated by the Environmental Protection Agency (EPA). In accordance with the ANSI/RESNET/ICC 301-2014 Standard, building inputs affecting setpoints infiltration rates, window shading and the existence of mechanical systems may have been changed prior to calculating loads

Ekotrope RATER - Version 2.2.4.1860

This information does not constitute a warranty or guarantee of home energy performance

Marcella Street - 2A-2



# 2015 IECC R-406 Projected Energy Rating Index Report

## Property

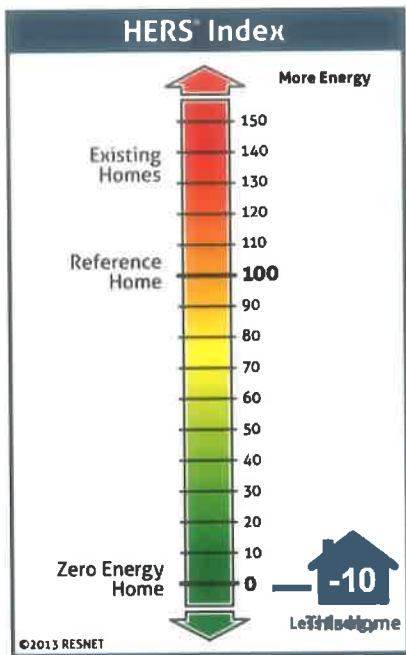
Builder: Rees-Larkin Development  
 Address:  
 Bldg A - Unit 2 Marcella St, Boston, MA

## Organization

Company:  
 Advanced Building Analysis, LLC  
 Phone: (978) 270-3911  
 Rater: Michael A Browne

## Energy Rating Index Information

Projected Rating  
 Rating No:  
 Rater ID (RTIN): 3992602  
 Date Rated: 1/26/2018



Estimated Annual Energy Consumption*		
	Rated Home Calculated Energy Use (MBtu)	Rated Home Cost (\$/yr)
Heating	1.5	\$75
Cooling	0.8	\$41
Water Heating	2.1	\$107
Lights & Appliances	15.9	\$791
Photovoltaics	-26.6	\$0
<b>Total</b>	<b>20.4</b>	<b>\$48</b>

\*Based on standard operating conditions

**ERI with PV: -10**

**ERI without PV: 32**

Annual Estimates	
Electric (kWh): 5,965.2	CO2 Emissions (Tons): -1.2
Natural Gas (Therms): 0.0	Energy Savings (\$)**: N/A

\*\*Based on the 2015 IECC R-406 Reference design home

Maximum Energy Rating Index: 55      This Home's Energy Rating Index: -10      **PASS**

This home MEETS the Energy Rating Index Score requirement of 2015 IECC R-406 based on Climate Zone 5. In addition to the Energy Rating Index other mandatory measures must be met. (See Mandatory Requirements on second page.)

Name: Michael A Browne

Signature:

Organization: Advanced Building Analysis, LLC

Date: Feb 12, 2018

## Rating Provider Data and Seal

Company: Energy Raters of Massachusetts

Address:

Phone #:

Fax #:



To determine if a provider is properly accredited go to: [www.resnet.us/professional/programs/search\\_directory](http://www.resnet.us/professional/programs/search_directory)

# 2015 IECC Building UA Compliance



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**Organization**

Advanced Building Analysis  
(978) 270-3911  
Michael A Browne

**Inspection Status**

Results are projected

Bldg A - Unit 2

E+ Marcella St, 2 A - 2

**Builder**

Rees-Larkin Development

## Building UA

Elements	IECC Reference	As Designed
Ceilings	16.3	12.8
Above-Grade Walls	29.6	15.2
Windows, Doors and Skylights	136.2	75.0
Slab Floor:	17.3	8.3
Framed Floors	0.0	0.0
Basement Walls	0.0	0.0
Rim Joists	2.4	1.3
<b>Overall UA (Design must be equal or lower):</b>	<b>201.8</b>	<b>112.6</b>

## Mandatory Requirements

<b>402.1.5</b> Total UA alternative for insulation and air leakage testing	<b>402.4.1.2</b> Air Leakage Testing	<b>402.5</b> Area-weighted average fenestration U-Factor
<b>402.5</b> Area-weighted average fenestration U-Factor	<b>404</b> Lighting Equipment Efficiency	Mandatory Checklist
<b>403.3.3</b> Duct Testing	<b>403.5.3</b> Hot water pipe insulation	

**Design exceeds requirements for IECC 2015 Prescriptive compliance by 44.2%.**

Name: Michael A Browne

Signature:

Organization: Advanced Building Analysis, LLC

Date: Feb 12, 2018